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ABSTRACT

The following papers are included: "Concepts on Marketing Issues in the Czech Republic" (Anne Mills); "Requiring More of Teacher Preparation: Authentic Assessment as a Vehicle to Reform" (Laura J. Wyant); "A Delphi Study of Professional Competencies for the Secondary Marketing Educator" (Trellys A. Morris); "The Status of Business and Marketing Teacher Education in North Carolina" (Stephen R. Lucas); "The Kentucky Model for Educating Bed and Breakfast Owner/Operators: An Educational Experience in Entrepreneurship" (Allan J. Worms, Carolyn L. Worms, Patty Rai Smith); "How Students in Business and Education Learn" (Donna R. Everett); "Implications of Site-Based Management for the Preparation of Public School Teachers and Administrators by Colleges of Education" (Terrance P. O'Brien, Rebecca R. Reed); "Improving Pricing Accuracy in Retail Stores through More Effective Employee Training" (G. Richard Clodfelter); "Cognitive Style of International and Domestic Graduate Students at Marshall University" (Laura J. Wyant); "Leadership in Retailing: Implications for Marketing Education" (Harriet Griggs); "Florida's School-to-Work Readiness Questionnaire: The Preliminary Data" (Frank T. Hammons, Catherine L. Redson); "The Program for Applied Academics Technical Studies" (Mary J. Thompson); "A Look at Survey Research Methods" (Thomas H. Arcy); "Restructuring Middle School Programs: Implications for Marketing Educators" (Wally S. Holmes Bouchillon); "Up-Date: DECA (Distributive Education Clubs of America) Membership and Winners' Comparison" (Marcella McComas Norwood); and "Integrating Education: Changes Needed in Marketing Education" (Wally S. Holmes Bouchillon). (MN)

ED 395 143

Marketing Education

Significance of Marketing Practices For Work Force Preparation 1995

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National Marketing Education Research Conference

Significance of Marketing Practices for Work Force Preparation

May 19 - 21, 1995
Holiday Inn, La Concha
Key West, Florida

Planning Committee Chairpersons

Marcella M. Norwood, University of Houston
Wally Holmes Bouchillon, University of West Florida
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INTRODUCTION

The first meeting of the Marketing Education National Research Conference was in March, 1984, at the University of Georgia in Athens, Georgia. This conference was an outgrowth of the southern regional conferences for teacher educators of marketing education. The first conference for the members of the southern region of the Council for Distributive Teacher Education (CDTE) was in February, 1975, at Georgia State University in Atlanta, Georgia.

The original purpose of the southern region conferences continues as the main purpose of the national conference — sharing of information. Research reports were and still are the main focus for the conference but also of key interest to the participants is the reporting of the status of various topics such as curricular efforts, state strategies, responses to legislation, and new configurations of teacher preparation programs.

The after hours of the conferences are scenes of noteworthy (at least worthy of recall with a smile on one's face) activities where camaraderie is evident in the group functions whether the activity is the chartering of a boat to view the sunset (it snowed on the group when the conference site was in Pittsburgh and when the conference site was in Key West the captain conducted a wedding ceremony) or enjoying a "pig-out" meal at a seafood restaurant in Auburn, Alabama. Interesting sites at campuses and cities makes this conference enlightening and entertaining on a full-time basis both during the conference meetings and at night.

The conference reach is national in scope but still has a noticeable "southern drawl." Past participants have also come from the other three regions of the United States and the United Kingdom. Not all participants have been in teacher education positions; other conference participants have held positions such as secondary school teacher, counselor, state director, office administrator, accounting professor, director of undergraduate advising, community college instructor, associate provost, and dean.

The basic theme of the conference centers around work-based learning and workforce development. The opportunity to come away from the conference with a new idea for research, a new approach on a problem situation, or a new contact for networking has always been present.

In the brief time from 1975 to 1995, many people have been instrumental in seeing that this annual conference maintains its solid foundation. For all those people it has been a true labor of love. Of the many people who have been key contributors to this twenty-year conference record, the late Dr. Lester Sanders

(University of Georgia) and Dr. Harold H. Williams (Auburn University) are given the credit for establishing and nurturing this national research conference effort. Those who have continued the work of the conference have held true to the admonition to devote one hundred percent of the time to the discussion of research and related information.

If you have not attended this conference, you have not experienced what many describe as the best conference if one seeks a personalized, high-touch, relevant conference where the participants' interests are served.

The conferences are generally held in either April or May each year. The 1996 conference will be held in Key West, Florida in May. The 1997 conference will be somewhere on the southeast coast; specific site and date are yet to be determined. Information regarding the conference can be obtained from Dr. Marcella M. Norwood, Department of Human Development and Consumer Sciences, College of Technology, University of Houston, Houston, Texas 77204-6861 (E-Mail: mnorwood@uh.edu).

—Dr. Stephen R. Lucas
University of North Carolina - Greensboro

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1995 National Marketing Education Research Conference

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Keynote Speech

Concepts on Marketing Issues in the Czech Republic

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Key West, Florida

May 19, 1995

Concepts on Marketing Issues in the Czech Republic

In every century throughout history there have been key dates that have registered the critical landmarks of that era. For the twentieth century, one immediately thinks of 1989, and of course, especially in the light of the recent celebrations, 1945. I believe that history will add 1989 to these outstanding dates.

Certainnly, for those who witnessed the fall of the Berlin wall and the euphoria of the train-loads of refugees flooding through Eastern Europe to the West, the images will live in their memories for a very long time

Amongst other things the re-opening of Eastern Europe and Russia have presented a myriad of opportunities for researchers to study, at first hand, the reality and the aftermath of the Communism.

From the perspective of my own research, I have chosen to focus on two related research areas, which I trust will contribute positively to the development of the growing body of research work being carried out in Eastern Europe.

My first area of study concentrated on analysing the macro transition process, with a view to predicting the type of market-based economy that is likely to emerge in that country.

model and the political philosophy underpinning it are crucial for understanding the post-communist policies in the region.

As regards my reasons for selecting the Czech Republic as a focus of my study, this was a combination of logic and luck, not unusual in research projects.

The logic behind selecting the CR rested with the fact that it is considered to be one of the more advanced countries in terms of the speed of its transition to a market-based economy. Additionally, there are some interesting factors that differentiate the Czech Republic from the majority of the other East European countries in that it was already a relatively advanced industrial country with a limited experience of democracy, when the communists took control in 1948. Thus the impact of communism in this regions differed from that of its immediate neighbours.

The luck aspect is associated with the fact that my institution has links with the University of Economics in Prague, and I lecture on the MBA programme to East European managers. This has enabled me to make contacts and set up networks of information, which have been invaluable to the research I have been carrying out.

The second area of my research considered the problems faced by the former-state owned enterprises as they seek to adjust to the new political and economic order. I believe this to be a critical field of research, as it is these enterprises which must generate the wealth required by the country if it is too raise its living standards to a level that is comparable with the West.

In studying these areas of research what were my findings?

Before I share them with you, I must re-iterate the universal disclaimer that the views about to be expressed are my own, based upon my own research, and I take full responsibility my findings. - If you don't like it, then blame me not the conference organisers.

The economic transition process in the majority of Eastern European countries has been dominated by the implementation of the IMF standardisation package of macro economic policy measures. These comprised:

Price liberalisation - supported by strong monetary and fiscal measures to control inflation

External currency convertibility to stimulate trade with the West

Balance of payments stabilisation - to avoid incurring or increasing the exceptionally high levels of external debt which are present in most EE countries.

Privatisation of state-owned property - to restore to private individuals the fundamental property rights necessary for free market transactions to be undertaken.

Fundamental to this whole transition process was the establishment of a banking and financial system to facilitate the development of an effective financial intermediation system.

All of these policies were to be introduced as quickly as possible to minimise the void left by the fall of communism, thus giving rise to the `shock therapy approach to the changes.

More fundamentally, however, was the political philosophy underpinning these policies. This philosophy was based on the neo-liberal economic model of the US and the UK characterised by minimal government intervention, short-termism and an outsider model of corporate governance.

Part of the rationale behind this approach was based upon comparisons between the situation in certain Latin American countries in the 1980s. Indeed some of the advisers involved in formulating the standardisation package had previously been employed as economic advisers to these regions of Latin America.

It is my belief that these policy measures and the rationale underpinning them is fundamentally flawed on several counts. Firstly, there is an implicit assumption amongst some foreign advisers and consultants that prior to the descent of the iron country the countries of Eastern Europe and democratic traditions and political institutions similar to those of the UK or America. Additionally, there seems to be the further assumption that they would in thr futuer re-establish such democratic insittutions.

The reality is that, apart from a brief flirtation with democracy in Czechoslovakia between the two World Wars, the countries of Eastern Europe have no democratic traditions. Even as late as the 20th century, these countries were ruled by absolute monarchs and powerful landed and military elites. The majority of the population were peasants who still enjoyed an almost feudal relationship with higher strata of society. Thus for many people the notion of a democracy is alien to their national cultural heritage and psyche. They do not possess the democratic capitalist frame of reference into which these transformation policy measures can be meaningfully set.

Concerning the assumption that these countries will adopt the neo-liberal political ideology underpinning the economic package, I will illustrate the fallacy of this belief in respect of the Czech Republic. On the surface the Czech Republic is seen as successfully fulfilling many of the criteria set out in the stabilisation package, whilst simultaneously retaining an apparently enviably low level of employment at some 6%.

It is true that prices have been liberalised and inflation has been reduced to some 10%. This has been achieved partly as a result of the rigid application of a strict wages policy that has been achieved by a social pact between the government, trades unions and employers.- following a model of consensual decision-making that is more reminiscent of the German co-determinist approach to industrial relations.

In terms of the balance of payments situation, the debt situation of the Czech Republic is very healthy. This is due primarily,however, as much to a fortuitous combination of events as to government policy. Unlike most other East European Countries the Czech Republic conducted some 95% of its trade with the CMEA countries. As it conducted very little trade with the West, it did not inherit massive debts when the communist regime fell. Additionally, the strikingly beautiful, unbombed city of Prague generates substantial amounts of invisible earnings by attracting ever increasing numbers of tourists.

In relation to privatisation, you may be familiar with the large privatisation project whereby the state undertook to disseminate ownership of the former state owned enterprises amongst the population by the issue of vouchers. Indeed, some 8.5 million people purchased the booklets of vouchers that enabled them to acquire shares in the privatising companies.

However, the majority of the population transferred ownership of their shares to investment companies lured by the promise of substantial returns on their voucher allocations. By the end of the privatisation process ownership of the vast majority of privatised enterprises was concentrated in the hands of some 6 investment companies. The majority of these ICs are owned by the banks, to whom many of the companies are very much in debt. The government still retains a significant ownership share within these banks.

From this, we can deduce two major conclusions. Firstly, the new ownership structure has created an insider model of corporate governance whereby banks own significant shares in enterprises similar to that of the German system. Secondly, the government continues to control the former state-owned enterprises ,either indirectly through the banks or directly through the National Property Fund. This state body controls the privatisation process and retains direct ownership of many privatised enterprises.

I would contend that what we are seeing emerge in the Czech Republic is not a liberal but a social democratic model similar to that of Germany. Indeed further analysis of government policy in the Czech Republic indicates that the government intends to adopt a highly interventionist approach, characterised by macro industrial policy and direct interventionism in relation to the operation of market forces.

This is demonstrated most clearly in relation to the unemployment situation. 6% unemployment does not sit comfortably beside the 25% fall in GNP that the country has experienced since liberalisation. It is the direct interventionist policy of government in limiting the application of bankruptcy legislation

and the consequent prevention of organisation restructuring amongst the over-manned inefficient SOE that is preventing the rise in unemployment.

Further support for the view that the Czech Republic is more sympathetically aligned to the Social Democratic model is based on the fact that the country has adopted the German model of company legislation, complete with works councils and co-determination.

Thus the assumption of an underlying neo-liberal philosophy is inaccurate. It is not my place here to judge which of the systems is better. The post war German success story is certainly a positive example of social democracy. It seems to me that the problems arise when the frame of reference of advisers and management educators is set in the framework of neo-liberalism with its implications for planning decision-making and control within enterprises, whilst the recipients of this perceived wisdom possess differing values beliefs institutions and laws.

I speak. here from personal experience based on many in depth discussions with Eastern European managers.

However, where emerging market-based economy in the Czech Republic differs from both of the typologies outlined above is the influence of corrupt bureaucracies and organised crime. Indeed, so significant is the potential influence of these issues on the transition process, that they could significantly distort the emerging political and economic form of the country. In this regard there are significant similarities with the Italian model where the influence of these groups is so great that the bribery levels have distorted the debt situation of the country. Organised crime has had a negative influence on attracting foreign investment and growth generally within the country.

It is to be hoped that these elements will be eradicated or their power reduced as the legislative framework and a civil society begins to develop. It may be, however, that they are so firmly entrenched in the system that they will retain their power base.

To consider my second area of research - what is the likely response of organisations to this new order? In effect, the transition has required a whole reordering of priorities within the former SOEs. Under the old regime, the main priorities of these enterprises was firstly, political, then social and finally economic. Almost overnight, they were required to change those priorities to that of economic, economic and economic. Unfortunately the legacy of the past regime has left the former SOEs with major problems. First and foremost are the massive debts inherited by the enterprises with the end of the soft budget constraints in 1989. Previously, the communist government has rolled over enterprise debt. Additionally the lack of market forces and financial intermediation rendered the concept of debt meaningless. Under the new regime, the Government has set up a special bank to assume responsibility for these debts. However, there are no funds available for the investment in capital and technology that they so desperately need. Banks lend for cash flow purposes only and charge penal rates of interest for doing so.

The collapse of the CMEA and the ongoing recession in the region do not help the situation, nor does the poor state of technology and communications. To understand what I mean, try sending a fax to Hungary or make an international call from Prague at 10 a.m.

The quality of human resources primarily in relation to poor quality management and demotivated workers.

In terms of considering possible strategies for change and restructuring in the Czech Republic. I undertook a stakeholder analysis, on the assumption that if the most powerful stakeholders did not believe that change was in their interests then it was unlikely to happen. The result for the former state-owned enterprises was not encouraging.

The main stakeholders comprise

the new owners - since these are the banks who are owed large sums of money by the former SOES it is unlikely that they will want to see the companies close or restructure.

the management - any re-structuring will doubtless reduce the numbers of managers, who not surprisingly are not keen to pursue change. This is especially true since the government has set up a state bank that is pumping money into these companies to keep them afloat.

From the employees perspective, they were never motivated to work hard under the communist system, and as we all know, attitudes and behaviour are very difficult to change. Since liberalisation, prices have increased and real wages have dropped. There is little hope of advancement in enterprises and the government is trying to keep down unemployment. As their jobs appear safe. not surprisingly, there is little incentive to change amongst this group.

As regards possible change agents, I considered the trades unions and possibly the human resource management function. Unfortunately. under the communist regime, these were the functions most associated with the party and consequently `still have the stink of the party`s dead body all over them.

Foreign investors are also seen as potentially powerful change agents. However, in the case of the Czech Republic the government is somewhat ambivalent to foreign investment adopting a `family silver' philosophy. The pattern of foreign investment has tended to be that of a few major companies comprising the main source of investment funds, with little by way of smaller foreign investors.

Perhaps, it needs a whole new generation educated in different set of values to effect the major transitions within these enterprises. Alteratively, if the funds supporting them run out then there may be no alternative but to rationalise and restructure them.

There has been a veritable explosion of small businesses particularly in the small business and service sector. Much of this new business activity emerged from the small privatization whereby small premises and businesses were put up for auction. Although the businesses were rapidly purchased at higher prices than anticipated. Like many aspects of policy in Eastern European countries the process was tainted by crime and corruption.

Additionally, it is very difficult to establish a business in the Czech Republic. There is very little finance available to start-up businesses with banks either refusing to lend or doing so only over the short-term and at prohibitively high rates of interest. Most of the available funds are uses to prop up the ailing SOES. One can question the long term wisdom of such a policy, as the economic future of the country lies not with the former SOES but these newer small enterprises.

There is also a complex legal and bureaucratic system associated with setting up a small business, where bribery and corruption are the accepted routes through the red tape to gain the necessary licences to open a business. Additionally, as small new enterprises they have as yet very little lobbying power in a system where pressure groups and lobbies have yet to be developed.

It must be remembered that these observations and conclusions are at best tentative evaluations of a transition process that is still in its very early stages. It should also be noted that the task facing the Czech Republic and other East European countries in undergoing this transformation is a task of monumental proportions in reconstructing a new political, social and economic order.

Perhaps the final word on Eastern Europe should rest with the greatest management guru of them all, no not Tom Peters but Machiavelli who astutely observed that `there is nothing more difficult to take in hands, more perilous to conduct or more uncertain in its success than to take the lead in the introduction of the new order of things.

Research Reports

Requiring More of Teacher Preparation

Authentic Assessment a Vehicle to Reform

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Refereed Paper

Running Head: Authentic Assessment

ABSTRACT

For students who are enrolled in a teacher preparation program, the lack of student participation in the learning process results in a loss of the skills, attitudes, and knowledge needed to be an effective classroom teacher. Upon graduation, students are faced with the task of applying and interviewing for teaching positions.

The researcher began to examine alternative assessment tools to address the concern of students after graduation. The implementation of portfolio assessments in various county school systems for classroom teachers, along with the mandate of a capstone experience for all undergraduate programs at Marshall University in Huntington, WV, prompted the exploration of portfolio alternatives. Research shows that portfolio assessment results in an evaluation and analysis of students' ability with the student taking part in the teaching/learning process.

The project's goals included the use of the portfolio as an introduction tool and aid in seeking and acquiring teaching positions. The student's portfolio will also provide a vehicle to demonstrate knowledge and understanding, while actively involving the student in the educational experience.

The project was implemented at Marshall University in Huntington, WV during the fall 1994 term. Response from students, faculty, and administration has been supportive in this endeavor. The professional portfolio is required of all undergraduate students in the Marketing Education program. The development of the portfolio begins in the student's first course, and continues throughout the student teaching experience.

REQUIRING MORE OF TEACHER PREPARATION
AUTHENTIC ASSESSMENT A VEHICLE TO REFORM

Introduction

Changes in education have been occurring at a phenomenal rate. If education is going to remain on the path of systemic reform, educators must be able to defend and explain the rationale behind the methods they use to teach, as well as the ways they select to assess student progress. Historically, education has viewed the student as a passive receiver of knowledge with little active input into the learning process. With contemporary meaning-based pedagogies, that view is beginning to evolve to a theory that views the learner as an active seeker and constructor of knowledge. Such concepts as constructivism and whole language will remain vulnerable to fads, unless theory and practice are closely and intentionally interactive in the classroom. Theory must guide our practice and practice must assist in modification of theory as needed.

A student must become an active participant in the learning process. They must again become responsible for their learning. Requiring students to complete a project as a class requirement does not necessarily make them active learners. Active learning goes beyond completing a project. It involves designing what will be learned, and how that learning will take place. Students also need to be held accountable for the quality of work they do, not simply the quantity.

STATEMENT OF THE PROBLEM

In many teacher preparation programs students fulfill requirements to arrive at an ends, which is teaching certification. While in their teacher preparation programs, very few students are actively involved in their learning process. They simply want to know what class to take next, and what courses fulfill the requirements. Each future teacher understands the need for pedagogical theory, curriculum, and methods; yet, they are so involved in the process of acquiring that teaching certification that they lose site of the skills, attitudes, and knowledge needed to be an effective classroom teacher.

Several things occur when students complete the undergraduate teacher preparation course and receive their teacher credentials. First, they begin to apply for teaching positions. Second, interviews are scheduled for these positions. Many of these former students find that even though they have completed the acquired courses, they have few other activities that demonstrate their potential. During that interview, graduates may be asked some questions that they may not know the answer. Or they vaguely remember discussing that particular topic in a class, but at that time they experience difficulty in remembering any details. These two events prove problematic for the future teacher. He/she did very well in school but the learning, for the most part, was of the skills and information type. Because they can be tested out of context, skills and information are easier to extract. For example, Who is the president of the United States? What does two plus two equal? This is the kind of information that lends itself to typical assessment methods. Higher-level skills are more difficult to test through multiple-choice formats because they depend on creative thinking and divergent solutions.

The researcher began to examine alternative assessment tools to address the concern of students completing a four-year teacher preparation program. Many students do not actively participate in their undergraduate program, and do not have a working knowledge of important concepts and topics.

Another issue that was prevalent at the time this project was undertaken, was the implementation of portfolio projects by various county school systems for classroom teachers. These counties were requiring their teachers to maintain a professional portfolio. Teachers were unaware of exactly what a portfolio was, or how to accomplish the task.

The president of Marshall University (the university where this project occurred) mandated that all undergraduate programs have a capstone experience. This was another institutional factor which was occurring at this time. Many programs began to explore the internship concept as their capstone experience. However, in education student teaching and other clinical experiences serve the same function as an internship. Therefore, the College of Education needed to explore other activities which would meet the standards of a capstone experience.

REVIEW OF LITERATURE

Yancey, K. Portfolios in the Classroom: An Introduction.

Yancey (1992) reports on the experiences of twelve teachers who have used the portfolio assessment. While their models for portfolio assessment were concentrated in writing instruction, they agreed that portfolio assessment lends itself to an analysis and evaluation of students' ability beyond skill.

Black, Daiker, Sommers, & Stygall. Handbook of Writing Portfolio Assessment: A Program for College Placement.

Miami University of Ohio uses a portfolio assessment model to place entering freshman in English composition classes. High school students who plan to attend Miami University are required to submit portfolios containing examples of their best writing for evaluation and placement. College credit and/or advanced placements are awarded to students who demonstrate their writing ability in their portfolio. Another somewhat unique aspect of Miami University's writing program, is its "team grading" departmental sessions. Instructors read essays and portfolios of each other's students. In the end, the individual instructor makes the final decision as to how he/she will use the grades assigned.

Hamp-Lyons & Candon. Questioning Assumptions About Portfolio-Based Assessment.

Hamp-Lyons and Candon again confirms that portfolio-based assessment enriches the learning process. Further, they found that it enriches the process of teaching and allows continuous feedback to the instructor concerning the teaching/learning process.

Types of Portfolio Assessments

Research revealed that there are several types and combinations of portfolio assessment models that a teacher could use to develop what works best for the teacher and the class. Among the most popular are the introductory portfolio, project portfolio, placement portfolio, and the evaluation portfolio. Each model has its own unique merit and it is the evaluators responsibility to design the portfolio model that is most appropriate for use in the classroom and program.

For this project, properties from each of the models will be incorporated. The introductory model is used because students who complete this portfolio could and should use it as an introduction tool when seeking teaching positions. Because many of the projects that are completed in the course work will become exhibits in the student's professional portfolio, the project portfolio model will be used in a limited sense. The portfolio does become a placement tool to a small degree, because continuation in the teacher preparation program is contingent upon successful completion of course requirements in each of the sequenced courses. These requirements become exhibits in the professional portfolio; therefore, placement in the next course is dependent upon completion of the projects and placement in the portfolio. The last type of portfolio is the evaluation portfolio and the professional portfolio is in fact an evaluation instrument. Student teachers must present their professional portfolio to members of a panel during their student teaching experience.

Project Goals

Goals of this project were:

1. To provide a vehicle for students to demonstrate competencies in theory.
2. Provide a vehicle for students to demonstrate a thorough knowledge and understanding of course content.
3. Provide a vehicle for students to demonstrate a thorough knowledge, understanding, and application of various instructional methods needed to accommodate all learning styles.

4. Develop a system that would allow students to become actively involved in their educational experience.
5. Develop a system through which students became responsible for their learning experience.
6. To provide a professional development tool which will assist students in seeking and acquiring employment.

Implementation

The project was implemented at Marshall University in Huntington West Virginia during the fall 1994 term. Approximately 25 students were involved in the initial implementation. These students were at various levels of progress in the undergraduate Marketing Education Teacher Preparation program. Students in the first three years of the program were required to begin work on and complete a professional portfolio to be presented during the student teaching experience. Students in the last year of the Marketing Education program were given the option of completing the professional portfolio.

Responses From Students

Student response has been excellent. Students were very inquisitive about exactly what it was and what was required when they were initially told of the added requirement of a professional portfolio. They then began to talk about how they felt this project would really benefit them when they were seeking employment. Historically, the professional development component had not been taken advantage of by the student. One student pointed out that she felt this type of assessment would encourage her to perform at a higher level, because she knew a committee will be evaluating and assessing the portfolio.

Responses From Faculty and Administration

The Department of Adult and Technical Education's faculty have been very supportive of authentic assessment. They view the portfolio as an effective evaluation tool, and have agreed to serve on student portfolio evaluation committees.

The administration at the university is supportive of the portfolio assessment model. The College of Education is considering adopting this model or a similar model for college-wide implementation.

The Model

Beginning with the student's first course, the portfolio assessment model implemented in the Marketing Education program at Marshall University requires students to be actively involved. Students are introduced to the concept of authentic assessment in their first course, and provided with detailed information concerning the professional portfolio required of the Marketing Education program. In this course, students are provided with a list of required and suggested activities. Each student in the course must complete and turn in these activities for a grade. If the activity is considered by the instructor to be worthy of inclusion in the portfolio, the student will be informed. The student may ask the instructor for ways to improve the assignment, if they wish the inclusion of the activity. Students are also provided a list of selected activities, in which they can choose. From this list, students must select certain activities (which are awarded a stated point value) for completion that add up to a required number of points. These activities can also be included if deemed of professional quality.

Each class in the undergraduate program is fashioned in the same manner as the first course. There are requirements that each student must complete for each course, as well as selected and optional assignments.

Activities, such as a program brochure, are started in the first course, and refined in each course thereafter. The final course, student teaching, requires the student to complete all work and organize the activities into a professional portfolio for presentation. The student must select a three person committee; one member must be from the department, one must be a classroom teacher, and the third member is the student's choice. However, this person must be familiar with education in some capacity. This committee is provided time to review the professional portfolio before the committee meeting is held. This meeting must occur before student teaching grades are submitted. The committee may ask the student to explain the projects and activities included and can make suggestions for improvement of the portfolio. At present, this committee serves in a review committee capacity, and does not determine successful completion of the program.

Management Difficulties

Organization is the key to success, so students need to know what is expected and how evaluation will occur. It is critical to provide tools for the student to use so they can assess their own progress in all activities. It is also necessary for the instructor to provide constant feedback in order to ensure improvement. Evaluation instruments must be developed for each project and disseminated to the student. The goal of each activity must be to provide professional experiences for the student.

SUMMARY

Portfolio assessment has proven to be a valuable tool in the Marketing Education program at Marshall University. Student interest has increased, participation in professional development activities has increased, as well as the quality of student performance. Faculty, administration, and public school officials have expressed their approval of the professional portfolio concept. This seems to be a win-win proposition of Marketing Education Teaching Preparation programs and one that can be implemented in an institution.

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A DELPHI STUDY OF PROFESSIONAL COMPETENCIES FOR THE SECONDARY MARKETING EDUCATOR

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Refereed Paper
Running Head: Teacher Competencies

Title of Study: A DELPHI STUDY OF PROFESSIONAL COMPETENCIES FOR THE SECONDARY MARKETING EDUCATOR

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The purpose of this study was to identify and gain consensus on the professional competencies that should be demonstrated by secondary marketing education teacher-coordinators. Using a Delphi Technique, recognized experts in marketing education suggested competencies which are needed in order to be successful as a secondary marketing education teacher-coordinator. These experts formed a consensus of opinion on 198 competencies.

There was agreement on the 196 professional competencies which were developed, therefore, it is concluded that it is a valid list upon which teacher education programs in marketing education can be based. Because there was agreement on the 196 professional competencies among the 4 groups: it is concluded that there exists a need for in-service teacher training using this list of competencies.

A DELPHI STUDY OF PROFESSIONAL COMPETENCIES FOR THE SECONDARY MARKETING EDUCATOR

Marketing Education was getting its formal start as a retail training program ten years prior to the Smith Hughes Act of 1917. It began under the direction of Lucinda Prince in the Boston area. With the support of the Women's Education and Industrial Union, Prince opened the Union School of Salesmanship with financial support from with financial support from Boston merchants. In 1936 Marketing Education, then known as Distributive Education, became a distinctive program separate from business (commercial education) with support and attention from the George-Dean Act. The strengthening of Distributive Education was seen as a way to stimulate a depressed economy in the Great Depression. Under the direction of the George-Dean Act, distributive education began as an adult education program designed to help those who were unemployed to find work in distribution and marketing occupations. Distributive Education moved into the high school, secondary environment, within a year or two. According to Meyer and Furtado (1976), "the retailing backgrounds of the early teacher-coordinators and curriculum bulletins published by the original Federal Board for Vocational Education became the basis for early program instruction" (p. 45).

Though early emphasis was primarily on adult programs, secondary school programs in retail selling appeared as early as 1912 and federally supported secondary programs as early as 1937. The adult focus continued in Distributive Education until the 1950's, when it began to be viewed as a program for secondary, as well as postsecondary students. At the 1963 National Clinic on Distributive Education, Nelson presented a paper entitled "Basis for Curriculum Development in Distribution," that provided the basis for conceptualizing the Distributive Education curriculum in five competency areas: (1) social competency, (2) basic skill competency, (3) technology competency, (4) marketing competency, and (5) economic competency (1963).

Background

One of the best known studies for planning teacher education, began as an examination of competencies required of retail workers. The study that later focused on implications for secondary programs in Distributive Education, was conducted by Crawford in 1967.

There have been numerous changes that impact upon Marketing Education since the study that was conducted by Crawford (1967). The curriculum has changed from being driven by the distribution system to the implementation of the marketing mix. The various competencies which Marketing Education students must possess to be successful in marketing has changed. The general marketing curriculum has changed, as well as the individual positions and competencies within the marketing cluster. The name change from Distributive Education to Distributive Education/Marketing and now to Marketing Education has impacted upon the Marketing Education discipline. The Marketing Education teacher must change as well in order to keep abreast of the changes which have already taken place and the changes to come in the Marketing Education discipline.

Given the current rate of technological change, the demographics of the labor force, and the changing attitudes and approaches to work of large segments of the work force, employers will be increasingly pressed to design and implement workplaces that function effectively as continuous learning environments. These increases in industry specific training have important potential implications for vocational teacher preparation. Howsam, (1976) stated that little progress would be realized until teacher education developed into the curriculum a body of recognized teaching skills.

Statement of the Problem

The problem of the study was that teacher educators do not know what professional competencies Marketing Education teachers need to acquire. During the 1980's, professionals in Marketing Education developed and adopted a new mission statement and premises to set future direction for the field. The Marketing Education profession had other changes which included a new name, Marketing Education, and a new professional association, the Marketing Education Association. The field of marketing has grown and is continuing to grow, therefore, there is an increase in the need for marketing workers. As the workplace changes the competencies have changed.

Purpose of the Study

The purpose of this study was to identify and gain consensus on the professional teacher competencies that should be demonstrated by secondary Marketing Education teacher-coordinators. This study deals with the professional skills of the Marketing Education teacher, rather than the technical skills. The technical skills are those which are required to train individuals to perform efficiently the technical tasks assigned to them (Borrowman, 1956). The technical tasks assigned to the Marketing Education teacher, is marketing.

Using a Delphi recognized experts in Marketing Education from across the nation suggested competencies which are needed in order to be successful as a secondary Marketing Education teacher-coordinator. Those same experts then formed a consensus of opinion on the relative value of all suggested criteria.

Research Questions

The following questions were addressed:

1. What are the professional competencies needed by secondary Marketing Education teacher-coordinators?
2. What value does each of the competencies have?

Methodology

This study consisted of the acquisition of information using a Delphi Technique designed by Delbecq, Van de Ven and Gustafson (1975). Delphi is a group process which utilizes written responses as opposed to bringing individuals together. This study obtained recommendations for secondary Marketing Education teacher-coordinators professional competencies from a panel of experts in the field of Marketing Education across the nation. This study then polled the experts asking them to make value judgments about the competencies submitted. The study used three mailed questionnaires, a comprehensive literature review and telephone interviews.

In order to determine the competencies for secondary Marketing Education educators, a descriptive research study was designed. The Delphi Technique has been used successfully in developing consensus of the future direction of education (Alley, 1985; Finch, 1985; Helmer, 1977; McCampbell & Stewart, 1992; Morrison et al., 1984; Swigert & Schabacker, 1974; Weaver, 1988). Descriptive research is the collection of data for describing conditions as they exist by assessing information about or from whole populations of people (Sax, 1966). This study used a method of descriptive research at the ordinal level of statistical measurement to interpret group suggestions and opinions into a collection of descriptive information for decision making (Dalkey, 1972).

The Delphi Technique has several common elements. These include the solicitation of independent judgements on a topic, feedback on the responses, opportunity to revise or substantiate opinions, and anonymity between panel members (Dalkey, 1972; Delbecq, 1986; Linstone & Turoff, 1975; Macmillan, 1971). In a classic Delphi, an open-ended question is presented to panelists with instructions for panelists to provide their opinions. Responses are then synthesized, and a second questionnaire is developed which presents the original responses and asks panelists to rate or prioritize responses. Panelists may also give feedback to support or oppose responses. Again, responses are synthesized and a new questionnaire developed to be distributed to panelists. This process is repeated until consensus is reached. (Bruno, 1976; Dalkey, 1967; Delbecq, 1986; Linstone & Turoff, 1975).

Consensus is generally achieved in three to four rounds of questionnaires (Delbecq, 1986; Sweigert & Schabacker, 1974; Uhl, 1975). Studies concerning the optimal number of rounds include Cyphert and Gant (1971), which found that nearly all respondents had developed their opinion by the third round of the Delphi, and Brooks (1979), who indicated that consensus was achieved in three rounds with little or no change evidenced by a fourth round of questionnaires. The achievement of consensus represents the collective judgement of the panel, as perceived by its members on an issue.

Population

Respondents for this study were selected from the following categories: (1) Marketing Education teacher-educators, (2) Marketing Education state supervisors/DECA advisors, (3) local Marketing Education teacher-coordinators, (4) leaders from the national marketing associations, MEA (Marketing Education Association) and DECA (Vocational Student Organization for Marketing Education). The selection of subjects also allowed for individuals nominated to suggest a potential panelist they felt would be a good candidate for the study by submitting their name on a postcard which was enclosed with the letter of invitation. The panelists selected from the teacher-educator category were chosen based upon their expertise in teacher education by the researcher. Teacher educators who serve on the Marketing Education Association research committee were nominated. A total of 16 teacher educators were identified through the Marketing Education Association as experts in research dealing with teacher education.

The panelists selected from the state supervisors/DECA advisors were nominated by the President of the Marketing Education Association based upon their active participation in Marketing Education and their expertise. A total of 12 state supervisors/DECA advisors were nominated for the panel.

The panelists selected from the local Marketing Education teacher-coordinators category were nominated by the state supervisors of Marketing Education as being exemplary teachers in all facets of Marketing Education work. A total of 31 state supervisors across the United States were contacted by telephone and asked to recommend an exemplary Marketing Education teacher to participate in the study. Each state supervisor nominated a teacher. The intent was to have teachers from all across the United States participate in the study.

The panelists selected from the leaders in national associations, Marketing Education Association and National DECA, were identified by their leadership roles in these organizations. A total of 13 potential panelists were identified and nominated by the researcher.

A person is considered an expert on a topic by virtue of their training, experience or position is likely to have relatively thorough knowledge of the topic. For expert opinion on a topic we turn to the authority (Pearson 1980). A total of 72 potential panelists were recommended from the four categories (Table 1). The goal was to obtain a minimum of 20 panelists from the combined four categories to complete the three rounds. Delbecq, Van de Ven and Gustafson (1975) contend that few new ideas are generated within a homogeneous group once the size exceeds thirty well-chosen participants. However, the authors indicate that the panel size is variable and that a minimum number of 10 to 15 people is required to generate sufficient new ideas for group processing.

A letter explaining the study and the importance of their participation, along with a self-addressed stamped postcard was sent to each nominated panelist. On the postcard the panelists were asked to mark "yes, I am willing to participate in the study - if so, please check the information on the label and make any corrections which might be needed", or "no, I am not able to participate in the study, however, I recommend:". From the 72 nominated panelists which received a postcard, a total of 67 returned the postcard. There were 53 who answered "yes"; 6 answered "no", but nominated someone else; and 8 answered "no".

A total of 53 experts from all of the four categories agreed to participate in each of the three mailed questionnaires, and to respond within the stated deadline by returning the self-addressed stamped postcard (Table 2). There were 33 experts who completed round 1 (Table 3), 29 experts who completed round 2 (Table 4), and 22 who

TABLE 1

NOMINATED PANELISTS FOR DELPHI

Group	Number Nominated	Percentage
Teacher Educators	16	22%
State Supervisors	12	17%
Teacher Coordinators	31	43%
National Leaders	13	18%
TOTALS	72	100%

completed round 3 (Table 5). When a panelist did not complete a round they were dropped from the Delphi panel. The 22 panelists who completed all three rounds fell within the range recommended by Delbecq, Van de Ven, Gustafson (1986).

The Instrument

Information for the study was acquired using an instrument designed by Dalkey and Helmer (1963) and revised by Delbecq, Van de Ven, and Gustafson (1975). The primary objective of a Delphi inquiry is to obtain a consensus of opinion from a group of respondents. It is used primarily in applied research for the purpose of planning or forecasting, according to Brockhaus and Mickelson (1977). Additionally, it has been used to plan curriculum in higher education, according to Judd (1972).

Collection of Information

The first round of the Delphi is the data gathering round. The first round of the study through questionnaire one, asked panelists to respond to the two broad question: (1) "What are the professional skills which are necessary for the secondary marketing education teacher-coordinator to possess?" (2) "What are the technical skills which are necessary for the secondary Marketing Education teacher-coordination to possess?" The study utilized a series of three instruments, each drawing upon the responses to the previous instrument, as prescribed by Delbecq, Van de Ven, Gustafson (1975).

Content validity, the judgement of whether the items represent the intended domain with the intended audience, was established by the researcher. Given the nature

TABLE 2

PANELISTS WHO AGREED TO PARTICIPATE

Group	Number	*Percentage
Teacher Educators	13	25%
State Supervisors	11	21%
Teacher Coordinators	21	15%
National Leaders	8	39%
TOTALS	53	100%

* Based upon the total who agreed - 53.

TABLE 3

ROUND 1 DISTRIBUTION OF RETURNS

Group	Number	*Pert.	**Pert.
Teacher Educators	9	21%	69%
State Supervisors	5	15%	45%
Teacher Coordinators	14	43%	67%
National Leaders	5	15%	63%
	TOTALS	33%	100%

* Based upon 33 who completed round one.
** Based upon the 53 who agreed to participate.

TABLE 4

ROUND 2 DISTRIBUTION OF RETURNS

Group	Number	*Percentage
Teacher Educators	10	35%
State Supervisors	4	13%
Teacher Coordinators	13	45%
National Leaders	2	7%
TOTALS	29	100%

*Based upon the 29 who completed round two.

TABLE 5

ROUND 3 DISTRIBUTION OF RETURNS

Group	Number	*Percentage
Teacher Educators	6	27%
State Supervisors	3	13%
Teacher Coordinators	12	55%
National Leaders	1	5%
TOTALS	22	100%

* Based upon the 22 who completed round three.

of the Delphi Technique, additional types of validity, concurrent validity, and construct validity which are concerned with the relationship of the items with some relevant external criterion and a psychological trait; are not a consideration in the Delphi Technique which seeks judgements on future events or activities (Ary, Jacobs, & Razavieh, 1990). Essentially, the validity of the Delphi items evolved through the consensus on agreement or disagreement with each competency by the Delphi panel.

Similarly, neither ecological nor population validity are pertinent to this study; no attempt was made nor is it appropriate to generalize the results of the consensus building to any situation or population. The objective of the Delphi Technique is to gain consensus among knowledgeable individuals on the current best forecast of future events or activities; consensus is specific to the situation presented in the Delphi items and the knowledgeable individuals who become the Delphi panel.

Reliability, the "degree of consistency with which it (the instrument) measures whatever it is measuring" (Ary, Jacobs, & Razavieh, 1990, p. 268), is also a moot issue in a Delphi study of this nature. By design, the Delphi Technique strives to achieve stability in response to the Delphi items. Changing responses from one round of the process to the next is the means by which consensus is achieved, and is accepted as essential to the Delphi process (Delbecq, Van de Ven, & Gustafson, 1986; McCampbell & Stewart, 1992; Weaver, 1988); thus, coefficients of stability were also deemed inappropriate.

The subsequent rounds, which in this case consisted of two more questionnaires, add refinement and validity to the results by allowing the respondents to rate each item, add items or modify items independently. Burcalow's (1985) use of many rounds in the Delphi produced a thorough refinement of the concepts presented. The one drawback was the tremendous amount of time needed to complete the process.

The major task in developing the second questionnaire was taking all the competencies which were generated during the first questionnaire and abstracting to eliminate duplication. The concern during the abstracting process was to avoid changing the meaning of any original statement, yet to combine similar statements. The second questionnaire was based on a Likert scale: respondents were asked to react to items by rating them using a Likert scale from strongly agree to strongly disagree. The competencies which receive 60% disagreement will be dropped from further consideration. The third questionnaire refined the competency statements based upon recommendations from the panelists. During the third round respondents were asked to rate competencies which were modified based upon the results of the second questionnaire using a Likert scale from strongly agree to strongly disagree and list comments.

Each questionnaire and accompanying cover letter was mailed to the expert panelists. Those panelists who indicated on the first questionnaire that they had access to a fax machine were sent the cover letter and questionnaire through facsimile. The use of facsimile allowed the panelists a few extra days to complete the questionnaire. Each panelist was asked to write responses to the questions and to return the questionnaire within the time frame given. Panelists who had not responded by stated deadline were contacted by letter at the end of the first round. Those who did not respond to questionnaires two and three were contacted by telephone to negotiate a date for the questionnaire to be returned. Responses were returned by priority mail, or by facsimile. Each panelist who was sent a questionnaire through facsimile was sent a stamped priority mail envelope for return. The identity of each panelist was held secret to prevent the domination of certain expert panelists, and to promote an atmosphere of freedom among panelists so that a wide range of responses to the open-ended questions were generated, as prepared by Delbecq, Van de Ven, Gustafson (1975).

Analysis of Information

The study asked panelists to generate competencies for secondary Marketing Education teacher-coordinators. The data was analyzed descriptively. Responses generated from the first questionnaire were listed, eliminating the competencies which were duplicates. The second questionnaire asked panelists to review the competencies which were gathered during round one and rate them using a five-point Likert scale, those receiving. The method of determining consensus had two levels of high points based on the Likert scale (strongly agree, agree), two levels of low points (disagree, strongly disagree), and a middle point - no opinion. For the items, if 60 percent of the panelists selected the high two points or the low two points, consensus was considered either in favor of or not in favor of the competency. For those competencies which received a 60% agreement they will be retained for the third round, while those receiving 60% disagreement will be removed from the Delphi and no further consideration will be given. In addition, respondents were encouraged to add comments either on specific items or on larger issues. The third questionnaire was a condensation of the second questionnaire. It was designed to reach a final consensus of the competencies needed by the secondary Marketing Education teacher-coordinator. The third questionnaire had the respondents to again rank the competencies using a Likert scale and give comments. The competency statements submitted to panelists during Round 3 were rated a second time by panelists in order to verify a final consensus. Consensus was considered achieved when at least 60 percent of the panelists reached agreement on a competency.

Responses

Research Question Number One

What are the professional competencies needed by the secondary Marketing Education teacher-coordinator? To answer this question a survey instrument was sent to 53 Delphi subject matter experts in March, 1994. It asked the professional skills which are necessary for the secondary marketing educator to possess?

Thirty two of the 53 experts contributed competencies during round one. Many of the competencies generated by the experts were duplicates to or similar to competencies suggested by other expert panelists. After an analysis of the competencies submitted a total of 198 professional skills.

In questionnaire two panelists were asked to list additional professional competencies which they felt were missing, no new competencies were submitted. During the second round panelists added comments and suggestions upon which the competencies were refined for the third round. There was one professional competency which received 60% disagreement upon completion of Round 2 and was dropped from further consideration (Table 6).

TABLE 6

COMPETENCIES WHICH WERE DROPPED AFTER ROUND 2

	Percent of Disagreement				
Competency	SA	A	NO	D	SD
Utilize a network system for teaching communication.	4	22	11	36	27

There were 26 competencies which were found to be redundant, 4 competencies were combined with others, 4 competencies were moved to a different category.

During the third round the same procedure was followed, panelists were asked to list professional competencies which they felt were missing. No new competencies were submitted during the third round.

Research Question Number Two

What value does each of the competencies have? To answer this question, the first questionnaires pooled competencies from the marketing experts. These competencies were used to design the second questionnaire. The second questionnaire results were analyzed to produce the third questionnaire which served as a final consensus on the teaching competencies needed by the secondary marketing educator. The means for the third round were computed to validate the importance of the competencies upon which 60% agreement was achieve Table 7). Table 7 shows the mean for each variable. It is easy to identify the level of agreement from 5 - strongly agree, 4 - agree, 3 - no opinion, 2 - disagree, 1 - strongly disagree. Twenty-two panelists responded to the third questionnaire. An added incentive for returning the third questionnaire by the stated deadline was offered. For the panelists who returned the completed questionnaire by the deadline, their names were entered in a drawing to win one of three prizes.

Summary of Findings

The purpose of this study was to develop a list of professional competencies which the secondary marketing educator should possess. The phases conducted to achieve the

TABLE 7

FINAL LIST OF COMPETENCIES WITH MEAN FROM ROUND 3

Competency	Mean
1) Meet with post secondary institutions to work on articulation agreements and to evaluate curriculums. . .	4.14
2) Organize and implement specialized marketing education courses.	3.64
3) Organize and maintain an advisory committee	4.68
4) Develop and implement marketing education program goals and objectives	4.50
5) Familiarize yourself with publications in marketing and vocational education	4.41
6) Develop tech-prep programs which reflect a sound knowledge of the relationship between academics and marketing	4.32
7) Develop the ability to be self-directed in program management activities	4.68
8) Obtain occupational analysis	3.82
9) Select students for marketing education program. . . .	4.41
10) Develop program rules and regulations.	4.59
11) Understand the impact trends have on the program . . .	4.41
12) Understand the contribution research makes to the field of cooperative vocational education.	3.86
13) Determine the impact of external factors on cooperative vocational education program success. . . .	4.27
14) Manage time efficiently	4.82
15) Evaluate marketing education program components	4.50
16) Understand the required forms and paper work.	4.55
17) Set priorities in an efficient manner	4.50
18) Develop a vision of the program and begin working towards that vision	4.41
19) Plan for school store management.	3.86
20) Maintain a program filing system.	4.10
21) Provide for student safety.	4.27
22) Conduct student follow-up	4.10
23) Set and manage budgets.	4.36

TABLE 7 (Continued)

FINAL LIST OF COMPETENCIES WITH MEAN FROM ROUND 3

Competency	Mean
24) Use computer for course management.	4.05
25) Determine courses to offer which benefit the business community.	4.00
26) Develop organizational skills	4.46
27) Use community resources in program planning	4.50
28) Use advisory committee in program planning and development	4.59
29) Plan and implement program improvement.	4.64
30) Synchronize out of class learning activities	4.18
31) Communicate both in writing and orally.	4.64
32) Maintain and manage an attractive and adequate classroom/lab environment	4.23
33) Conduct a community survey of business needs/trends	3.73
34) Establish standards for student behavior.	4.68
35) Attend seminars, workshops, and other activities to enhance professional competence.	4.68
36) Complete routine responsibilities within the school setting	4.41
37) Adapt to the role of learning manager vs. lecturer.	4.46
38) Develop the ability to be flexible with lesson planning.	4.41
39) Recognize sources of assistance for instructional improvement	4.32
40) Select instructional materials.	4.50
41) Prepare teacher-made instructional materials.	4.46
42) Describe the various types of experiential education.	3.10
43) Manage the learning environment	4.59
44) Integrate academics into curriculum	4.59
45) Plan for serving special needs students	4.41
46) Set and implement instructional goals	4.46
47) Develop marketing based curriculum supported by the National Curriculum Framework.	4.18
48) Develop logically sequenced course of study and long range plan	4.55

TABLE 7 (Continued)

FINAL LIST OF COMPETENCIES WITH MEAN FROM ROUND 3

Competency	Mean
49) Develop list of potential guest speakers.	4.14
50) Identify computer applications.	4.18
51) Adapt program according to results of evaluations . . .	4.27
52) Develop and implement assessment and evaluation instruments	4.32
53) Develop multiple versions of tests.	3.86
54) Adapt performance-driven grades	4.46
55) Develop varied, criterion-references assessment techniques.	4.36
56) Develop a procedure for keeping track of student grades	4.32
57) Plan interesting lessons with multiple delivery methods, based on current concepts and practices in marketing	4.73
58) Applying learning styles theory to instructing.	4.18
59) Use current technology to support curriculum.	4.36
60) Identify student assignments which relate in-school instruction with on-the-job training.	4.46
61) Apply classroom management strategies	4.46
62) Analyze, synthesize, and evaluate various instructional methods in terms of student, teacher, environment, and content	4.27
63) Develop and utilize innovative and creative teaching methods	4.68
64) Demonstrate effective presentation skills	4.64
65) Demonstrate effective speaking skills	4.68
66) Demonstrate effective listening skills.	4.68
67) Apply appropriate questioning strategies.	4.46
68) Integrate and reinforce academic skills into lessons. .	4.41
69) Use cooperative learning.	4.41
70) Use team-building	4.55
71) Use peer tutoring	4.14
72) Introduce new materials and concepts.	4.50
73) Evaluate effectiveness of teaching methods upon student learning.	4.41

TABLE 7 (Continued)

FINAL LIST OF COMPETENCIES WITH MEAN FROM ROUND 3

Competency	Mean
74) Provide individualized instruction based on student need and occupational objective	4.32
75) Direct student laboratory experiences	4.23
76) Use audio-visual equipment.	4.46
77) Use multi-media hardware and software	4.05
78) Provide positive reinforcement and motivational incentives.	4.55
79) Provide remedial activities for students.	4.41
80) Facilitate classroom discussion	4.55
81) Use a variety of learner centered methods	4.64
82) Design out of class experiential assignments	4.14
83) Incorporate commercially developed materials into instruction	4.23
84) Create a positive classroom environment	4.82
85) Develop teaching strategies for the cognitive domain.	4.36
86) Develop teaching strategies for the affective domain.	4.41
87) Develop teaching strategies for the psychomotor domain.	4.36
88) Analyze student aptitude and ability	4.14
89) Assist student in assessing career objectives	4.41
90) Provide guidance to students.	4.50
91) Maintain an open channel of communication with students.	4.59
92) Develop a library of materials for marketing careers	4.36
93) Conduct individual conferences throughout the the year with students	4.55
94) Assess student problems and direct to appropriate school/community agency.	4.36
95) Assist students in developing goals.	4.50
96) Develop a knowledge of career ladders.	4.36
97) Counsel students with job-related topics	4.55
98) Maintain good rapport with parents	4.59
99) Maintain good rapport with administrators.	4.73
100)Maintain good rapport with business community. . . .	4.69

TABLE 7 (Continued)

FINAL LIST OF COMPETENCIES WITH MEAN FROM ROUND 3

101)Use resources of business community.	4.59
102)Integrate the marketing education program into the school.	4.64
103)Integrate the marketing education program into the community	4.59
104)Network with education colleagues	4.55
105)Join civic groups	4.00
106)Serve as a liaison between the school and community	4.36
107)Participate in school functions	4.41
108)Research business employment needs.	4.36
109)Foster collaboration between State/Federal initiatives	3.59
110)Plan an employer-employee function.	4.00
111)Develop training programs to meet community needs	4.18
112)Develop and execute a recruitment plan.	4.55
113)Construct and maintain an on-going marketing plan for the program	4.54
114)Identify and analyze all internal and external publics affected by the program	4.23
115)Prepare news articles/releases.	4.55
116)Arrange for radio and tv presentations.	3.77
117)Plan and conduct an open house.	3.73
118)Train students to become ambassadors for the program	4.32
119)Visit training sponsors frequently.	4.50
120)Evaluate potential training stations.	4.55
121)Discuss how to use training stations.	4.14
122)Recommend solutions for problem areas in cooperative vocational education.	4.32
123)Develop the ability to feel comfortable working with business leaders	4.59
124)Understand the importance of good coordination.	4.64
125)Understand labor laws	4.32
126)Recognize the need for accountability in all facets of the program	4.50

TABLE 7 (Continued)

FINAL LIST OF COMPETENCIES WITH MEAN FROM ROUND 3

Competency	Mean
127)Investigate and react to scenarios specific to the marketing education coordinator.	3.99
128)Understand various types of vocational education co-op programs.	4.10
129)Develop work place learning experiences	4.36
130)Use coordination time effectively	4.60
131)Make home visits as needed	3.73
132)Set up and use a training plan for individual students.	4.50
133)Place students with occupational objective in mind. .	4.46
134)Prepare training agreement.	4.73
135)Maintain accurate records for coordination.	4.64
136)Develop a plan/system to monitor student attendance at training stations	4.32
137)Coordinate the training and evaluation of marketing co-op students with classroom curriculum.	4.55
138)In coordination activities emphasis on student development first, then employer conveniences.	4.14
139)Work towards developing a positive image coordination time.	4.55
140)Provide safety instruction	4.14
141)Monitor and evaluate student progress on-the-job training in a timely and consistent manner	4.64
142)Advise a student-operated DECA chapter	4.77
143)Develop an understanding of DECA and the benefits it can provide students	4.73
144)Integrate DECA activities into the curriculum.	4.68
145)Establish leadership activities through DECA	4.64
146)Assist members in planning a program of work	4.55
147)Guide and coordinate student organization activities .	4.50
148)Organize and maintain an active DECA chapter	4.73
149)Guide student participation at DECA conferences. . . .	4.55
150)Complete paperwork for participation in DECA activitie	4.68
151)Assist with the operation of DECA competitive events .	4.64

TABLE 7 (Continued)

FINAL LIST OF COMPETENCIES WITH MEAN FROM ROUND 3

Competency	Mean
152)Train and guide DECA officers.	4.59
153)Oversee development of a student organization budget .	4.41
154)Understand the various DECA competitive events.	4.68
155)Plan fund raising activities with DECA members.	4.68
156)Promote DECA within the school to keep its visibility high within the general student population.	4.64
157)Motivate students to participate in DECA	4.82
158)Update teaching and marketing skills through participating in professional development	4.77
159)Participate in professional teams.	4.09
160)Develop a vision for the marketing education program .	4.59
161)Become a self starter.	4.59
162)Maintain local/state certification requirements. . . .	4.73
163)Develop a sensitivity to diverse student populations .	4.50
164)Promote equity in all aspects of the program	4.68
165)Promote the concept that business and industry is our customer not the student.	3.55
166)Attain leadership skills.	4.36
167)Serve as a role model for students.	4.73
168)Develop a personal philosophy on marketing education to guide decision-making	4.41
169)Develop interpersonal skills	4.59
170)Understand work ethics and their role in the American work force.	4.64
171)Understand the role business and industry can play in educating our youth.	4.55
172)Articulate program philosophy and mission.	4.36
173)Understand the needs of various populations we serve.	4.32
174)Maintain a current knowledge base on issues, legislation and initiatives related to education .	4.18
175)Understand the Fair Labor Standards Act	4.27
176)Understand sexual harassment issues.	4.14
177)Attend activities which contribute to knowledge base	4.41

TABLE 7 (Continued)

FINAL LIST OF COMPETENCIES WITH MEAN FROM ROUND 3

Competency	Mean
178)Accept responsibility for supervising student teachers	4.09
179)Assume fair share of non-teaching assignments.	4.09
180)Keep up-to-date on the technology in marketing. . .	4.27
181)Serve the marketing profession	4.27
182)Network with other secondary marketing education teachers.	4.59
183)Involvement in school/community to assist in facilitating change	4.27
184)Support your professional associations.	4.46
185)Participate in faculty activities	4.41
186)Ask for constructive criticism regarding the program	4.41
187)Maintain good grooming habits and professional appearance.	4.68
188)Use library resources	4.18
189)Describe the relationship between lesson planning and curriculum.	4.18
190)Develop curriculum which is industry driven and validated.	4.18
191)Collaborate across curriculums and between levels. .	4.32
192)Plan for integration of the curriculum into non-classroom components	4.23
193)Differentiate between curriculum and instruction . .	4.05
194)Describe curriculum functions, strategies and foundations.	4.00
195)Understand the role curriculum plays in vocational-technical education	4.14
196)Understand the content areas in vocational-technical education	4.36
197)Understand the nature of occupational research for curriculum development.	4.00
198)Use technology in curriculum development and delivery	4.09

purpose and objectives of the study consisted of instrumentation, selection of respondents, collection of data, treatment of the data and the presentation and analysis of the data.

The identification of competencies needed by secondary marketing educators was accomplished using the Delphi Technique. The three round Delphi found agreement on 198 competencies (Table 7).

Conclusions

Based on the data analyzed it appears that the following list of conclusions are appropriate:

1. Because there was agreement on the 196 professional competencies it is concluded that it is a valid list upon which teacher education programs in Marketing Education can be based.

2. Marketing Education teachers are products of their education and work experience; therefore, efforts are needed by Marketing Education teacher education professors if major changes are to be implemented.

Recommendations

The following recommendations should be implemented:

1. The developed list of competencies should be distributed to Marketing Education teacher educators, state supervisors and others who are responsible for curriculum development and pre-service and in-service training programs in Marketing Education.

2. Teacher educators should use these competencies in developing a curriculum for Marketing Education teacher education.

3. State supervisors of Marketing Education should develop this list of competencies into a tool for evaluating secondary Marketing Education programs.

4. Principals, administrators, vocational directors, and others responsible for evaluating the work of secondary Marketing Education teachers should use these competencies as a tool for evaluating the secondary marketing educator.

5. Marketing Education teachers are products of their education and work experience. If major changes are to be implemented to update marketing skills then efforts are needed by professors in Marketing Education to conduct workshops and seminars to up-date the Marketing Education teacher.

6. Marketing Education is a cooperative effort of school and the business community; therefore, the business community should be involved in the curriculum development for secondary marketing educators.

Recommendations for Further Study

The following recommendations are given for further study regarding secondary Marketing Education teacher competencies.

1. Further study should be conducted using competencies identified through this study, combined with competencies identified in the literature.

2. Persons from the four groups used in the study should meet at a conference to consider the implications this study might have for the improvement of Marketing Education.

Implications for Practice

The product of this study should be viewed as the foundation for assisting secondary Marketing Education teacher-coordinators to develop the professional competencies which are needed to be successful.

This study should encourage teacher educators and state supervisors of Marketing Education to assist the profession in developing the competencies identified through the study. These competencies should be developed through pre-service training for future secondary marketing educators, as well as through in-service training for current secondary marketing educators.

Caution

The following caution is given for the reader:

Because the panel did not examine technical competencies which have been found through other studies, the developed list of 196 competencies is not an exhaustive list.

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The Status of Business and Marketing Teacher Education in North Carolina

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The Status of Business and Marketing Teacher Education in North Carolina

Abstract

The institutions of higher education in North Carolina have a long history of preparing teachers for instruction in business subjects in the public schools of North Carolina. The status of the programs and the predictions of what the environment will be in the near future, with implications for suggested change, are the foci of this report. This study reports the concerns expressed by a sample of the faculty involved in the delivery of these teacher preparation programs and, specifically, what might be the environment in which these programs will be maintained, expanded or eliminated.

The Status of Business and Marketing Teacher Education in North Carolina

The state of North Carolina (NC) has an active public and non-public array of institutions of higher education (IHE). Twelve of the 47 public and non-public IHEs that offer teacher preparation programs in various fields (e.g., chemistry, English, history) offer either the business and/or marketing teacher preparation program(s) leading to a license to teach. There are sixteen business education (BE) and/or marketing education (ME) programs in twelve North Carolina institutions of higher education. Of the sixteen programs, five are marketing programs and eleven are business programs. At four of the institutions, both business and marketing programs are offered. Three non-public IHEs offer business teacher preparation only; and no non-public IHE offers marketing teacher preparation.

Purpose.

The purpose of this paper was to explore the subject of the status of business and marketing teacher preparation in North Carolina by reporting the enrollment status, strategies, and concerns expressed by the faculty charged with the delivery of these program and to discuss what might be the environment for these programs in the future.

Although most of these programs have been in existence for decades, the future is murky. The continued existence of business and marketing teacher preparation programs has been a subject of frequent discussion, both formally and informally, at conferences in the seventies, eighties and, now, nineties. It is a subject that impacts on several themes: "What are the recommended format(s), if any, for teacher preparation?," "Will business education and/or marketing teacher education be offered in the future?," and "What will be the source of business and marketing teachers for the public schools?"

Commentary on the Recent Literature.

In the April, 1993, publication of the Business Education Forum, Luft and Noll discussed the changing profile of business education at IHEs. In their report, information was presented that has implications for both business and marketing teacher preparation programs in North Carolina. They reported in their findings that 43.4% of the programs were located in schools of business, 35.3% were in schools of education, and 21.3% were located in "other" (Luft and Noll: p. 9).

Luft and Noll also reported projections of university faculty retirements and resignations for 1990-91 to 1994-95. They projected an increase from the 11 replacements in 1990-91 to double that figure in 1994-95. However, each year, in a five-year period, fewer empty positions were projected to be filled. Finally, in the 1994-95 year, more than 30% were projected not to be filled. The message delivered in that paper was that the future for faculty growth is in the business content area where more faculty for business content would be hired for replacement as well as more new faculty would be hired for newly created business content positions whereas business pedagogy faculty projections would be decreasing in number (Luft and Noll: p. 9).

In regard to the future of business teacher preparation programs, more than one-third reported that their programs would be integrated with other teacher education programs, downsized, or eliminated. Almost half expected to maintain the status quo while almost one-fifth expected to grow. As to sustained supply of newly-minted doctorates in business teacher education, 14 institutions responded that they had a doctoral program and 12 stated that their doctoral programs were "safe" from being eliminated in the foreseeable future. These same doctoral programs averaged 1.3 graduates each year with .5 graduates seeking a new position (not returning to previous position of employment) (Luft and Noll: p. 10).

In the April, 1994, publication, Policy Perspectives, an article entitled "To Dance With Change" reported that students and parents are measuring the quality of the IHE, in general, in terms of obtaining secure and well-paying jobs. The report states, "The good news is that the vocational purposes now being attached to higher education translate into increased demand for a baccalaureate degree -- with the result that higher education enrollments are on the rise" (AACSB: p. 3). An ominous statement appropriate for the business and marketing education audience was reported, "... no institution will emerge unscathed from its confrontation with an external environment that is substantially altered and in many ways more hostile to colleges and universities" (AACSB: p. 1).

In their concluding statements, the discussion of IHE change contains a critical implication for business and marketing education programs, "None of these changes can be commanded, legislated, or regulated." "They must instead come from the sense of internal discontent that, when combined with external inducement, yields a purposeful recasting of institutional function." "To demur, to respond, 'I'm OK, just want to sit this one out," is to let someone else choose your partner as well as call the tune" (AACSB: p. 12).

Methodology.

As a beginning point to this study, a survey was mailed to each of the sixteen business and/or marketing teacher preparation programs identified in the publication of the NC Department of Public Instruction, Teacher Education Programs: North Carolina Approved. Ten of the sixteen programs (62.5%) comprised the group that responded. The ten programs were located in eight of the twelve universities offering such programs (six public and two non-public IHEs). The purpose of the survey was to obtain a sense of the status of enrollments in the programs, obstacles being faced by the faculty, and their projection of what the future holds for their programs. As a follow-up to the survey, the author discussed the relevant issues, in person, with a majority of the representatives of the business and marketing programs of the IHEs. The IHE respondents were from institutions with total undergraduate enrollments ranging from 1,800 to 19,000 and total graduate enrollments ranging from non-existent (no graduate program) to 5,000.

Current Enrollment in the Programs.

Of the 47 NC institutions of higher education, twelve IHEs offer at least one teacher preparation program. The following is a list of those NC educational institutions by category of public and non-public IHEs with those that offer business and/or marketing programs indicated by an X.

IHE	Business	Marketing
Public IHE		
Appalachian State University	X	X
East Carolina University	X	X
Elizabeth City State University	X	-
Fayetteville State University	X	X
North Carolina Agricultural and Technical State University	X	-
North Carolina State University	-	X
Pembroke State University	X	-
University of North Carolina at Greensboro	X	X
Western Carolina University	X	-

Non-Public IHE	Business	Marketing
Lenoir-Rhyne College	X	-
Meredith College	X	-
Saint Augustine's College	X	-

The preponderance of business and marketing teacher preparation programs (eight programs in business and five programs in marketing) are part of the University of North Carolina (UNC) system (the public university sector). The UNC system is comprised of 16 IHEs (including the NC School of the Arts which has no teacher preparation program). Only three programs, all business, are offered in the non-public sector of IHEs.

Any UNC systemwide edict applied to teacher preparation programs will have a monstrous statewide effect. In 1989, the Board of Governors for the UNC system passed a ruling that would have such an effect on business and marketing teacher preparation programs. They implemented a requirement that all teacher preparation programs, not identified as being in an arts or sciences subject area, must revise the particular program so that a "second major" in an arts or sciences area would be a part of each student's program of study leading to the baccalaureate degree.

The term, "second major," is described as "...a coherent course of study in a basic academic discipline comparable to, but not identical with, the course of study for a major in that discipline." It..."requires a minimum of 24 credit hours in the discipline" (Polen, Gottovi, and Suarz: p. 3).

The impact of this decree had varying effects on particular programs and campuses. As an example where little was changed, the agricultural education program at one IHE moved to the College of Agriculture to accommodate the "second major" charge. Agriculture courses were considered a science area and they were able to reduce other non-related requirements of the previous school unit where the program was housed; it was reported to be a good "marriage" and enhanced the program. An example where no change was required occurred in the home economics program which was identified as being in an arts or sciences category so no change in the program of study was needed.

Business and marketing had no such arts and sciences identification. Thus, at least 24 semester hours (s.h.) were added to the existing degree requirements (the total minimum number of semester hours required to meet the mandate for a "second major"). In one case, the "second major" requirement resulted in a program that took more than four years to complete a 135 semester hour program. At least half the programs reporting had a 128 or more s.h. program; a typical four-year degree program is 122 s.h.

The obvious need to reduce a program was not possible for many programs because other administrative units or agencies required that certain courses and/or hours of a subject be included in the bachelor's degree. (For instance, state and national accrediting requirements, university requirements as well as school unit general requirements, such as those of the schools of business and education, all impact on mandated competency areas.) For those programs that had no alternative but to add the 24 semester hours to the program of study, approximately four years after implementation of the second major, drops in enrollments were painfully visible as the student teaching numbers were drastically reduced in most of the programs.

For some programs, for example those in a school of business, a reprieve for the moribund programs was made possible but not until the mid-90's. At that time, a different view was taken of teacher preparation programs of business subjects and these programs were no longer considered to be in the purview of the American Assembly of Collegiate Schools of Business (AACSB). This meant BE and ME programs were not subject to those areas stressed by the AACSB such as the common body of knowledge courses. Curriculum revision was then possible but the second major still had to be intact. The subject area that could be reduced was the business area. By this time, however, the trend data for number of majors was sharply downward (for example, at one institution the combined BE and ME graduating seniors was reduced from a range of fifteen to twenty prior to the second major to two to five after the second major).

In 1994, five years after the implementation of the mandated second major, the same UNC Board of Governors implemented another requirement that all bachelor degrees must be obtainable in four years. The targeted year for the change is AY 1995-96. Programs are required to map out a four-year plan. Any program can consist of as many as 128 s.h. However, this puts the program at a disadvantage when compared to the majority of bachelor degree programs requiring only 122 s.h. Programs that had existed under 128 s.h. will now have an additional disadvantage. The four-year requirement places critical importance on strict adherence to the sequence of the program so that the student will be able to successfully follow the program at the beginning and throughout the four-year plan. There is no room for error or changing to the BE and/or ME major(s) at a later time in a student's college studies. For some programs, the combination of the four-year mandate, a 128 s.h. program, and the second major will render transfer students and on-campus students changing their major to BE or ME to a thing of the past. The message conveyed by these realities is, "Only freshmen need apply."

Trend of Program Enrollments.

The respondents reported that the average number of majors, freshman class through senior class, was 15 in business while the average number of majors in marketing was 12. Dual majors (seeking a license in both business and marketing) were reported at two institutions and the average number of majors in that combination of programs was six. The average number of majors who graduated in business in 1994 was two, the average number of majors who graduated in marketing was three, and the average number of dual majors graduating in 1994 was two. No program can be sustained over time with numbers this low.

Graduates of these programs do very well in the first year after graduation in regard to obtaining teaching positions. Ninety-four percent of the business graduates were employed in teaching positions in the first academic year after graduation. More than seventy percent of the marketing graduates were employed in teaching positions in the first academic year after graduation. There was no question asked of the respondents regarding other employment, however, business and marketing education majors have often been cited as being equally prepared for a career in a business field and that may explain the disposition of the remaining percentages of graduates

There is an additional category of student that can best be described as "non-traditional" and may be referred to by several terms but, essentially, is a postbaccalaureate student. Respondents indicated that all eight institutions had an "irregular" category. The average for those IHEs was 15 additional majors per IHE. With eight IHEs reporting students in this category, it would appear that this group of individuals represents a significant addition to the business and/or marketing programs.

The postbaccalaureate students possess a bachelor's degree and are either presently teaching with a "lateral entry" provisional license (already employed in a business/marketing teaching position) or are seeking a license to teach and are not yet employed in a teaching position. Students in this type of program of study follow the undergraduate business and/or marketing program; courses already completed in the previous bachelor's degree program are deleted from the program of study requirements.

In the majority of cases, a program of study for a postbaccalaureate student has a range of semester hours from 23 to 44. Using one of the UNC programs as an example, the courses generally not appearing in previous degree transcripts are as follows:

School of Education (total of 11 s.h.).

Institutions of Education (3 s.h.); Educational Psychology (3 s.h.); Issues in Secondary Education (3 s.h.); and Reading in the Content Area (2 s.h.).

School of Business and Economics (total of 30 s.h.).

BME:
Methods of Teaching Business and Marketing Subjects (3 s.h.); Administration of Business and Marketing Education Programs (3 s.h.); Community-Based Learning (3 s.h.); Field Study (3 s.h.); Supervised Student Teaching (9 s.h.).

Marketing:
Retail Management (3 s.h.) and Selling and Sales Management (3 s.h.).

Information Systems:
Business Computing I (3 s.h.).

School of Heath, Physical Education, Recreation, and Dance (total of 3 s.h.).
Public Health (3 s.h.).

Despite the fact that overall IHE enrollment in NC business and marketing teacher preparation programs has declined since the enactment of the "second major" requirement in the arts and sciences, local education agencies (LEAs) have managed to employ people to fill the teacher position openings. The qualifications of this "new" source (non-traditional) of teachers continues to be a much-discussed subject among groups who have an interest in teacher preparation and teacher supply.

The Environment for Business and Marketing Teacher Preparation Programs.

The literature cited in this report indicated two basic models (school of business and school of education) plus the category, "other." These three categories reflect the formats used in the IHEs of North Carolina. However, even in the two basic models, the configuration will vary from program to program -- Is the business or marketing program a stand-alone department? Is it integrated with a department with a broader purpose (for example, business administration or management in the school of business and curriculum and instruction, secondary education programs, or vocational teacher education in the school of education). The fact that the literature reported that more than a fifth of business teacher preparation programs were located in units other than business or education, indicates there are other options than the traditional two models.

To serve as an example of an option, a recent announcement was received for a position in business education in a department located at the University of Tennessee; the marketing position is also located in the department described. The department's title is Human Resource Development. The school unit in which the department resides is the College of Human Ecology. The college's new organization is comprised of the following: Department of Human Resource Development; Department of Health, Leisure and Safety Sciences; Department of Nutrition (which includes the Division of Hotel and Restaurant Administration); Department of Textiles, Retailing and Interior Design; and the Department of Child and Family Studies.

The former name of the department was the Department of Technological and Adult Education. The change occurred in 1994. Programs in the Department of Human Resource Development serve 200 undergraduate students. The programs are vocational education; business/marketing (this program area is described as including teacher education and training); industrial education (this program area is described as including technology education, industrial training, and trades and industries); and home economics teacher education. There are at least seven areas listed for an average of 28.6 students per program area, freshman through senior class. In addition, there are 200 graduate students enrolled in the master's and doctoral programs. The low numbers in the freshman through senior class yield extremely low numbers per course in the specialty areas; the integration of specialties provides the chance for higher enrollments in integrative courses. New alignments such as the one described here are instructful and suggest ways in which new networks of cooperation can be realized.

Regardless of the organizational structure of the program, BE and ME faculty must adjust to the reality of the second major. The environment has been significantly altered. The future for business and marketing programs in North Carolina has, indeed, been impacted by the unproven second major requirement. In the conclusion of an evaluative report on the second major requirement conducted by the North Carolina Educational Policy Research Center, it was stated, "The policy sought to increase subject knowledge in the arts and sciences, to improve education course offerings, and to limit the teacher preservice training to four years. In practice, students did receive more instruction in the arts and sciences, education course offerings were reduced with unknown effects, and a number of students were unable to finish their teacher preparation training in four regular academic calendar years." "There is a need to modify the policy to minimize the negative effects that result from the compromise while, at the same time, maintaining the advantages that the policy provides." "From a policy perspective the results suggest a number of collaborative efforts to modify the policy and make it more effective" (Polen, Gottovi, and Suarz: p. 13).

Open-Ended Items on the Questionnaire

In addition to the overall request for information regarding specific enrollment and graduation numbers, nine questions were asked in an attempt to determine information that may offer insight as to prospects for the future.

#1. Has enrollment in your institution's undergraduate program(s) been consistent over the past five years?

Six of the twelve respondents reported that undergraduate enrollment has been consistent over the past five years while the remaining six reported that enrollment was inconsistent. The enrollment numbers reported per program area had a range of two to 34 and an average of 16.6 majors per program area. The IHE at the high end of the range offered the options of BE, ME and the dual major while the IHE at the low end offered only one program.

Two programs reported moderate to great increases in the last two years. Reasons advanced for this was attributed to increased recruiting efforts such as high school visits by faculty, transfers from community colleges, and scholarships and an awards programs.

The reasons for decreases were attributed to the demographics of high school graduates (fewer in number) and the implementation of the second major requirement.

#2. Has enrollment in your institution's graduate program(s) been consistent over the past five years?

All respondents reported that postbaccalaureate students were enrolled in their program area. There were 250 students reported to be pursuing a postgraduate program of study. The options were a postbaccalaureate program of study to qualify for the first level of teacher licensing, master's degree in BE or ME, and the Certificate of Advanced Study (the CAS is a post-master's program of study). An average of 25 students per institution were enrolled in some phase of postbaccalaureate studies. The range of total postbaccalaureate students per institution was from one student to 75 students. Students seeking graduate degrees totaled 95 (38 percent of the postbaccalaureate total) with all but one graduate degree-seeking student pursuing a master's degree. Four institutions did not offer the master's degree. Of the remaining four institutions that offer the master's degree, an average of 24 students per institution were enrolled in master's degree studies. The range of total master's degree students for the four institutions was from thirteen students to 35 students.

Only three respondents reported that the postbaccalaureate enrollment had been consistent over the past five years whereas the remaining seven reported that it had not been consistent over the past five years. Consistency in enrollment was attributed to new programs being implemented which offset a looming decrease and the view that student interest remained at the same level. Explanations for decreases were lack of interest by current undergraduate students as well as teachers in the field and a decrease in tuition reimbursement by employers.

#3. Have you or other members of your institution made an effort to attempt to increase the number of dually licensed graduates in BE and/or ME?

Only two institutions had reported enrollment of dual licensing programs; respondents for these two institutions reported that they were attempting to increase the number of dually certified graduates in BE/ME. The major activity for accomplishing this goal was through advising.

#4. Is there sentiment on the part of your institutions's administration to eliminate the BE and/or ME programs?

Four of the respondents reported that the administrations at their IHEs have expressed the sentiment to eliminate the BE and/or ME programs. Half of those who reported that the program was in jeopardy commented that class size regulation was strictly enforced. They reported that any course with enrollment under the specified required number for each course, for example ten students per course, would not be offered. Two respondents reported lack of support by administrators on a philosophical basis.

#5. Are you aware of any change that occurred at your institution in the past five years that had an impact on BE and/or ME?

Five of the ten respondents reported that changes had occurred in the past five years that had an impact on BE and/or ME. These changes were reported as both positive and negative.

On the positive side, changes were the elimination of shorthand in the business education program, participation in the NC Teaching Fellows scholarship program, more postbaccalaureate students, the implementation of new graduate programs, and a personnel change in an administrative position that impacted the program.

On the negative side, changes reported were the requirement of the second major, reduced ancillary support, and reduced funding.

#6. Do you anticipate any change(s) at your institution in the next five years that will have an impact on BE and/or ME?

Four of the ten respondents anticipate changes at their institutions in the next five years that will have an impact on BE and/or ME. The changes reported by the four range from elimination of the program (three respondents) to merging the program with a business discipline (marketing) in the school of business (one respondent). The reports include comments such as "ME will be eliminated in the next couple of year;" "BE is on shaky ground;" and "The master's program will probably be eliminated in a couple of years."

#7. What are your most successful recruitment practices?

By far, the most successful recruitment practice reported was contact with secondary students. This contact, as reported, was through mailings, high school visitation, and campus tours. The second most frequently reported practice was contact with secondary school teachers and administrators. Scholarship programs were also mentioned.

#8. What do you think will be the statewide, university status of BE and/or ME in the years beyond 2000?

Four of the ten respondents thought that BE and ME would be offered at a maximum of two universities in the years beyond 2000. Only one respondent felt that, with good promotion, business and marketing could get a new life. Single comments from the respondents stated that less emphasis will be on licensure because of low public school teaching salaries and that the field of business education will no longer have an identified discipline because of technological advances. Finally, one respondent stated that BE and ME teachers will be learning and teaching an entirely different group of courses in entirely different ways.

#9. In what department and school at your institution is BE and/or ME administratively housed?

Six of the ten respondents reported that their programs were administratively housed in a school of business; the four remaining programs were in a school of education. There was no majority departmental designation reported. Departmental titles varied as follows (alphabetical order): business administration; business and technical education; business/marketing education and administrative services; curriculum and instruction; and occupational education.

Conclusions.

The survey indicated that the respondents, the people who are most intimately involved in the conduct of BE and ME programs, envision a future that is bleak. While there are certainly positive aspects in the midst of a threatening environment, nevertheless, the sense of the feelings expressed by the respondents is one of challenge, at best. Will they be ready for the changes that will be needed? Statements of conclusion are presented below.

* Many of the respondents indicated that they felt that only a few programs would survive.

* There was some indication that programs that survive would do so only by an increased promotional effort and adjustment in the program design.

* Programs that are most likely to survive will have the total support of their institution.

* Programs that survive will be those which can justify an existence based on the market.

Recommendations.

One of the things BE and ME have in common, unfortunately, is that the programs are in danger of being eliminated. If programs are to survive, the faculty of these programs must be cognizant that, in today's society, any university is

THE KENTUCKY MODEL FOR EDUCATING BED AND BREAKFAST OWNER/OPERATORS: AN EDUCATIONAL EXPERIENCE IN ENTREPRENEURSHIP

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at the

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The Kentucky Model for Educating Bed and Breakfast Owner/Operators: An Educational Experience In Entrepreneurship

Introduction

In 1989 a series of business start-up seminars were initiated in response to requests for entrepreneur education in the bed and breakfast business. The seminars were continued through 1994 with a total of twenty-two seminars presented to date at geographically dispersed locations throughout Kentucky. More than 600 people attended the programs and at least 200 businesses have been started by participants. Primary results of the seminar series are the education of a number of entrepreneurs and the establishment of a new state industry, since fewer than thirty bed and breakfast businesses were operating in the state prior to 1989 and even fewer were identified by state reference (Kentucky Department of Travel Development, 1989).

Further, review by the Kentucky Bed and Breakfast Association reveals that while some people have become disenchanted with guest service in their homes or for other reasons did not remain in the originally established business, few or no business failures have resulted to date. This paper identifies procedures used in the workshops and other factors that are thought to have contributed to success of this entrepreneur education program and may be useful to other educational efforts.

Background

Many bed and breakfast homestay businesses and inns existed in New England states and along both U. S. coasts prior to initiation of the seminar series (Lanier, 1990). However, experience with this type of business was very limited in Kentucky. Requests for information and business assistance had grown in adjoining states during the previous two to three years (Espeseth, 1989). As requests for information were being received by the Kentucky Cooperative Extension Service and the state government's Business Information Clearing House, it was felt popularity of the business type had begun to spread (Kirk, 1989). Further, several requests for information had come from persons owning large homes whose children had matured and moved out. These "empty nesters" were at least limited evidence of a growing audience of prospective entrepreneurs seeking supplemental income from a home-based or other low investment business. With this in mind, consideration of initiating a business education program was begun.

Conditions which seemed to lend to an "uprise" in bed and breakfast businesses in Kentucky and throughout the mid-south were as follows:

1) the bed and breakfast industry was well established along both the nation's coasts and gradually growing westward from New England states;
2) Kentucky was well positioned with respect to urbanized, populous states to the north which were the source of an economically viable customer base. Also, many of these persons already had experience visiting B&B's elsewhere and might be regarded as prospective customers for Kentucky; and,
3) Kentucky had a huge number of large, attractive, old homes (many of which were historic) in acceptable condition which might lend themselves well to development of bed and breakfast businesses.

Initiating this extended program in entrepreneur education was not without its challenges, however. Barriers/problems confronting the successful establishment of such new businesses included:

1) economic conditions -- it was the beginning of an economic recession;
2) very few Kentucky entrepreneurs with or without business experience knew anything about the bed and breakfast industry or what would be required of them for success in such a business;
3) Kentucky public health laws and/or regulations supportive of bed and breakfast businesses did not exist;
4) the bed and breakfast industry was generally unknown throughout Kentucky and was not supported by favorable local opinion or local planning and zoning regulations; and,
5) virtually no fire, liability, or other insurance experience supportive of bed and breakfast businesses existed in the state.

Designing the Program

The task of developing an educational program involved several steps. First, educators knowledgeable of home-based business development and tourism/recreation businesses began assimilating the educational content required for a bed and breakfast business start-up workshop or seminar.

Second, a workshop or seminar format had to be devised that would provide the kinds of content needed and that would support high participant interest. At least part of the success of the program would depend on the attention and enthusiasm for presentation content among attendees. Accurate content and discussion of investment risk and other deterrents to successful and rewarding business operation were vital, however, and could not be neglected.

Third, factors peculiar to operation of bed and breakfast businesses in Kentucky had to be anticipated and addressed. These included evaluation of broad market conditions, health and hygiene regulation and management circumstances and other business climate factors prospectively unique to Kentucky.

It was surmised that the workshop or seminar format needed to be adequately thorough to cover a number of topics, yet brief enough to meet prospective participants' available attendance time frames. A week long or multi-day short course format was thought to be both too time consumptive and costly for participants to support good attendance. Entrepreneur education procedures successful elsewhere in marketing education, commercial recreation and the tourist industry were reviewed early in the process.

During the summer of 1989, the authors learned of a bed and breakfast education procedure which had been used by extension specialists in Indiana and Illinois (Espeseth, 1989). This procedure involved two important steps that were observed and used in Kentucky's evolving entrepreneur educational procedure. The steps involved, first, organization of a one-day seminar using short topical presentations rather than a program which exhausted a particular topic. This procedure allowed introduction of a number of subjects of concern during one day and provided the audience with enough familiarity with the subject or issue that they could research it in greater depth pertinent to their own site and at their discretion.

The second step involved use of a panel of speakers composed of in-operation bed and breakfast business persons. These business people were able to address topics and issues of direct concern to the audience and provide many useful comments from their personal experience.

Additional content addressed the lack of entrepreneurs' fundamental understanding of what bed and breakfast businesses most vital operations should be to achieve success, how to generate local community support, how to market the business, management of health and hygeine issues, and so on.

The first Kentucky seminars were held in Louisville and Paducah, Kentucky, during the first week of November, 1989, with the assistance of Extension Specialists Robert Espeseth (from the University of Illinois) and Robert Buchanan (Purdue University). The seminars were advertised through local print media in Kentucky, Indiana and Illinois. Additional exposure was gained through an appearance on an early morning television interview show by a Kentucky extension specialist. Attendance at the Louisville seminar included 110 prospective entrepreneurs with some having come from Indiana. More than thirty additional attendees from the media, other businesses and state government also attended. The Paducah seminar was attended by fifty-three persons and also attracted several from across the river in Illinois.

The attendance at these first seminars suggested high enthusiasm for the bed and breakfast business type. Certainly, several people attended due to curiosity and because the seminar registration fees were very economical. There was concern, however, that large crowds might not support adequate educator attention to individual needs of attendees.

Following the first seminars, the procedure was revised to provide a somewhat more individualized teaching setting and to specifically address Kentucky circumstances. The typical seminar program then included topics as illustrated below.

8:30 - 9:00 Registration. This early morning period supported late registration activities but an additional effort was always made to support a period of socializing. The availability of coffee and pastries in a location promoting the opportunity to meet other attendees and program personalities was sought for every seminar.

9:00 - 9:10 Welcome. The process of "welcoming" the audience included a brief introduction to objectives of the program by a local county extension agent who acted as host and encouraged each attendee to stand, give their name and indicate their interest or purpose in atending the program. This procedure provided the audience an opportunity for self identification, to become more comfortable within a group learning context and to overcome their initial reluctancies to speak out when questions arose during the presentations. Additionally, it provided seminar leaders with limited, but useful information on attendees' geographic origins, business objectives and on people in attendance who had already begun a B & B business and/or had problems.

9:10 - 10:00 What is a B and B? The first presentation of each seminar always used a 35mm slide show by an extension specialist designed to clearly identify the basic components of a bed and breakfast business: a) bed/lodging; b) breakfast/the single meal service; and, c) bath facilities. This element also defined other structural and quality characteristics important to each business, i.d., the distinction between a "homestay" and an "inn", the visual qualities of exteriors, entryway settings, and other features. In every seminar the potential for diversity in building structure, size and style, and owner personality expressions in interior and exterior decor were illustrated. The importance of quality in the setting and guest experience were stressed.

10:00 - 10:30 State Laws and Regulations. Each seminar included a presentation outlining relevant laws and regulations. An expert from state government's Business Information Clearinghouse was enlisted for this topic.

10:45 - 11:15 The Tourism Industry and Your B and B. Following a short break an expert on the tourism industry from extension, state government or an organization, explained that B and B customers were people seeking a recreational experience through travel and illustrated sources of assistance from tourist industry agencies and organizations. They reinforced the importance of quality businesses and the usefulness of a cooperative relationship between businesses and other segments of the tourism industry.

11:15 - 12:00 Insurance, Food Service and Local Regulations. This segment covered a host of vital topics from several types of insurance risk and rates to critical aspects of hygeine and health management. After new state health regulations were devised for the new industry, they were also presented in a published booklet.

Lunch was always provided as an organized event on the site. The possibility of participant departures was minimized, discussion during the lunch period was supported and participant attention to the issues of the seminar was maintained.

1:00 - 1:50 Developing a Business Plan. The component on business planning always followed the presentations dealing with state laws and regulations and with insurance and local regulations. By this point in the learning process, most participants had become very aware of the importance of these issues and were receptive to the business planning process.

1:50 - 2:40 Marketing a B and B Business. This component taught the fundamentals of marketing, including external and internal marketing, use of media and other elements appropriate to this type business. It was presented as a necessary part of good business planning. Again, quality, service to guests and good management were stressed.

2:50 - 3:05 Systems for Networking. The opportunity to use reservation services, to obtain assistance and business ideas from a state bed and breakfast business association and other networking opportunities were presented. By this point participants had begun to realize the helpful relationships between tourism, state and private organizations existed and were available to them.

3:05 - 3:45 Panel of B and B Owners. This final component was a powerful factor in maintaining participant attendance to the end of the day as well as their attention. The panel was selected from among operating business people with considerable experience. The panel was composed of individuals with good speaking skills and special insight to business problems new entrepreneurs might encounter. Each panel member was "interviewed" by an extension specialist as to his/her business characteristics, location and any problems they may have had. Presentations were usually very informative and a lively question and answer session was always conducted.

Essentially the same procedure was followed for each of the twenty seminars presented. Participants left the seminars with a clear understanding of the business they were considering, with many questions answered and with useful knowledge of how to seek solutions to other problems.

Conclusions and Recommendations

The bed and breakfast businesses established throughout the state have been successful enterprises. Close contact with the industry maintained throughout the duration of the seminar series contributed to an awareness of many changes in operations. Also, interview of leaders of the Bed and Breakfast Association of Kentucky and a geographic review of businesses disclosed no business closings due to financial failure of the bed and breakfast operation. Assumptions supporting the lack of business failures include:

- a bed and breakfast business is a personal endeavor closely tied to a family's lifestyle. When job changes occur or family needs result in moves from the property, the business may change hands or close. Finances often have nothing to do with the need to cease operating the business.
- most Kentucky business owners are not operating the bed and breakfast as the sole family income, therefore, if business is

slow there are other financial resources.
- the Cooperative Extension educational programs prepared the prospective operators for the problems they would face as well as the pleasures they might enjoy when starting a bed and breakfast business.

Factors which are thought to have contributed to the success of the seminar series and growth of businesses across the state were as follows.

The small group presentation nature of the seminars allowed teachers to stress quality factors and maximize learning in areas thought critical to entrepreneur success. Further, many topics fundamental to development and management of a business could be presented due to the brevity of individual presentations. Also, opportunities to ask questions and discuss concerns were strongly encouraged.

Presentation of the opportunity for diversity among homes and other structures which could qualify as a business site was often received favorably by seminar participants. The capacity for an individualized experience in each business became clear. Further, as the seminar program progressed, visual display of attractive, newly founded Kentucky businesses contributed to this awareness among new seminar participants.

The consistent presentation of the importance of quality as an element of business appearance, decor and every guest's experience in seminar after seminar is felt to have contributed to careful attention to quality details in most business's establishment and management.

Kentucky's many historic buildings/homes, and attractive settings undoubtedly contributed to the number of opportunities for bed and breakfast homestay businesses. Research of the businesses established by 1991 found that 78.1% were in homes or buildings built prior to 1900 (Worms, 1991) and fully 25% were in "federal" (pre-1830) structures or earlier.

The hosts themselves were found appealing to many couples and individuals. When asked "what was the most enjoyable part of this visit" guests noted "the Host's traits", the "experience" and the B & B "atmosphere" including decor, etc., were most important (85.1%) among fourteen attribute choices.

Finally, the growing trend towards weekend and short vacations was thought supportive of tourist's inclination to seek out special recreational experiences during brief travel periods by many groups (Naisbitt, 1990,). Many guests (46.9%) stayed only one night during their visit (Worms, 1991, p. v). This growth of a consumer market coupled with the flexibility afforded by a home-based business undoubtedly attracted many seminar participants and their decision to enter the bed and breakfast business.

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HOW STUDENTS IN BUSINESS AND EDUCATION LEARN

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Running head: HOW STUDENTS IN BUSINESS AND EDUCATION LEARN

Abstract

The purpose of this study was to determine from training experts, educators, students, and trainees which instructional methods were perceived as effective and which were used by trainers and educators. The 14 instructional methods were case study, computer-assisted instruction, coaching/mentoring, computer-based training, films/video, interactive video, lecture, supervised on-the-job training, peer tutoring, programmed instruction, role playing, seminars/workshops, simulations, and team teaching. In addition, the findings were compared with the 1994 Industry Report in *Training* magazine.

Data from training experts showed that 12 of 14 methods were perceived as effective. By contrast, educators perceived 10 of 14 methods as effective. Trainees in industry and students in traditional classrooms ranked 11 methods as effective; however, trainees and students only observed one method being used--lecture.

HOW STUDENTS IN BUSINESS AND EDUCATION LEARN

INTRODUCTION

Business and marketing educators and professional trainers in business have a common goal: to prepare workers for an increasingly sophisticated workplace. Evolving technology, dwindling resources (both human and economic), demanding work methods and procedures, and global competition are forcing businesses to train, upgrade, and reskill and upskill their workforce in order to, literally, stay in business. Today, businesses are more dependent than ever before on workers who can think, create, make decisions, work as team members, and practice lifelong learning.

Education in general, and business and marketing education in particular, cannot keep up with changing technology and workplace competencies in this kind of *dynamic* environment. Therefore, business has had to assume a role that once belonged solely to education, training over 14 million people at a cost of $50+ billion a year (1994 Industry Report, 1994). Business and marketing educators have not abdicated their roles in preparing students for and about business; this remains the number one priority. Many educators are training consultants and providers; others work closely with advisory committees to keep curricula as up to date as possible and practical; and still others are using their skills to become entrepreneurs.

Students in education and trainees in industry have an enormous stake in their learning and training. For employees, advancement may depend on their willingness to continue to develop professionally; for students, competition for and obtaining a position in the workforce means acquiring skills which once were required of supervisors. To accomplish these goals, training and teaching methods must be selected which will have an impact on students' and workers' learning, development, and advancement.

OBJECTIVES OF THE STUDY

The purpose of this paper is to answer the following research questions:

1. What training methods are perceived as effective by trainees in business and industry?

2. What training methods are observed by trainees as used by trainers?

3. How do the responses of trainees compare to the responses to the same research questions by students, teacher-educators, professional trainers, and as reported in the 1994 Industry Report from *Training* magazine?

Answers to these questions should provide insight into what methods can be utilized to enhance learning and growth. Additionally, the comparisons of the feedback should provide an informative overview into effective instructional techniques from five different perspectives.

RESEARCH METHODS AND PROCEDURES

In order to collect data to answer the research questions, the following procedures were employed for three phases of this study:

Everett and Drapeau (1994) identified and validated 14 teaching methods and how trainers and teacher-educators perceived their effectiveness and use. A survey instrument was used to gather the data. The 14 training methods, identified from a content analysis of the Tables of Content in *Training* magazine and *Training and Development Journal* for a five-year period, were case study, coaching/ mentoring, computer-assisted instruction (CAI), computer-based training (CBT), films/video, interactive video, lecture, supervised on-the-job training, peer tutoring, programmed instruction, role playing, seminars/workshops, simulations, and team teaching. The 14 training delivery systems appear to run the gamut from individualized learning to machine-mediated instruction to traditional classroom methods.

In a follow-up study, Everett and DeWitt (1994) surveyed students in traditional classrooms, using the 14 methods arrayed in two survey instruments in a pre-/post-test design. The pre-test instrument used a Likert-type scale to rate the effectiveness of the identified methods: 4=Highly Effective; 3=Effective; 2=Somewhat Effective; and 1=Not Effective. The post-test survey instrument added an additional scale item that asked students if the method had been used (0=Not Used). The 67 students surveyed were enrolled in a College of Business in classes, such as Advanced Business Communication, Curriculum Development, Introduction to Management, Marketing, and Training and Development.

The final stage of the study utilized the same pre-/post-test survey design to collect information from trainees in business and industry. In all, 92 trainees from four industrial settings (two insurance companies, a government contractor, and a university) were surveyed in training courses, such as Management Development, Interviewing Techniques, Job Performance Reviews, Hazardous Communications Training, Resume Writing, Communication for Managers, and Effective Supervision.

For all studies, instructional systems were perceived to be *effective* if they received a mean ranking of 2.5 and above. Training methods were reported as *used* frequently if they received a mean ranking of 0.5 and above.

PRESENTATION OF FINDINGS

Table 1 presents data related to the research question, What training delivery methods are perceived as effective by trainees in business and industry?

It appears from Table 1 that trainees perceived 11 of the 14 training methods as effective (receiving a mean ranking of 2.5 or above). Films/Video, programmed instruction, and lecture were not perceived as effective. Three of the training methods perceived as effective--supervised on-the-job training, coaching/mentoring, and peer tutoring--appear to be methods categorized as one-on-one job training; three effective methods could be classified as individualized, machine-based learning methods--CAI, interactive video, and computer-based training; and five of the methods may be considered traditional training methods--simulations, seminars/workshops, case study, team teaching, and role playing.

Table 1

PERCEIVED EFFECTIVENESS OF TRAINING METHODS BY TRAINEES AS PRESENTED BY THE MEAN RANKING

n=92

Survey No.	Method	Means	S.D.
13	Supervised OJT	3.511	0.687
2	Coaching/Mentoring	3.323	0.740
12	Simulations	3.074	0.833
11	Seminars/Workshops	2.957	0.828
8	Peer Tutoring	2.945	0.794
1	Case Study	2.923	0.749
14	Team Teaching	2.789	0.800
3	CAI	2.736	0.743
6	Interactive Video	2.775	0.687
4	CBT	2.659	0.801
10	Role Playing	2.634	1.130
5	Films/Video	2.452	0.634
9	Programmed Instruction	2.452	0.684
7	Lecture	2.441	0.744

Table 2 (on page 5) presents the findings to the research question, What training methods are observed by trainees as used by trainers? Only one method--lecture--was used by trainers in business and industry (receiving a mean ranking of 0.5). Ranked a close second was films/video.

Table 3 (on page 6) presents the comparison of the effectiveness of the 14 methods based on the mean rankings of the four groups (professional trainers, teacher-educators, trainees, and students) in partial answer to the third research question, How do the responses of the trainees compare to the responses of the other three groups (trainers, educators, and students)?

Significant findings are revealed in this table: Trainers ranked 12 of the 14 methods as effective--more than the other three groups. Lecture was ranked as effective by educators, but not effective by the other three groups. Films/Video was ranked as effective by trainers and educators but not by trainees or students. Role playing was ranked as effective by trainees, educators, and students but not by trainers. Team teaching was ranked as not effective by educators. All four groups ranked the one-on-one instructional methods--supervised OJT, coaching/mentoring, and peer tutoring--as effective.

Table 2

USE OF TRAINING DELIVERY SYSTEMS BY TRAINEES AS PRESENTED BY THE MEAN RANKING

n=92

Survey No.	Method	Means	S.D.
7	Lecture	0.537	0.196
5	Films/Video	0.45	0.256
1	Case Study	0.410	0.331
11	Seminars/Workshops	0.368	0.336
2	Coaching/Mentoring	0.323	0.338
10	Role Playing	0.323	0.341
8	Peer Tutoring	0.293	0.308
12	Simulations	0.268	0.318
14	Team Teaching	0.159	0.279
13	Supervised OJT	0.149	0.293
6	Interactive Video	0.148	0.272
9	Programmed Instruction	0.145	0.236
4	CBT	0.077	0.206
3	CAI	0.074	0.204

Table 4 (on page 7) presents the contrasting data related to training methods used as reported by the four groups to complete the answer to the third research question. Additionally, the last column of the table presents the methods used as reported in the 1994 Industry Report from *Training* magazine. From the data in Table 4, it appears that professional trainers use a larger repertoire of training methods. However, educators, students, and trainees reported only one method used--lecture. Of significance to report is that professional trainers ranked simulations as the instructional method most effective and most often used.

Table 3

COMPARISON OF PERCEIVED EFFECTIVENESS OF TRAINING METHODS BY TRAINERS, TRAINEES, EDUCATORS, AND STUDENTS

Trainers n=45	Rank	Trainees n=92	Rank	Educators n=128	Rank	Students n=67	Rank
Simulations	1	Supervised OJT	1	Case Study	1	Supervised OJT	1
CAI	2	Coaching/ Mentoring	2	Supervised OJT	2	Simulations	2
Films/Video	3	Simulations	3	Simulations	3	Coaching/ Mentoring	3
Peer Tutoring	4	Seminars/ Workshops	4	Coaching/ Mentoring	4	Role Playing	4
Coaching/ Mentoring	5	Peer Tutoring	5	CAI	5	Seminars/ Workshops	5
Supervised OJT	6	Case Study	6	Lecture	6	Case Study	6
Seminars/ Workshops	7	Team Teaching	7	Seminars/ Workshops	7	CAI	7
Team Teaching	8	CAI	8	Role Playing	8	Interactive Video	8
Programmed Instruction	9	Interactive Video	9	Films/ Video	9	Team Teaching	9
Interactive Video	10	CBT	10	Peer Tutoring	10	Peer Tutoring	10
Case Study	11	Role Playing	11			CBT	11
CBT	12						

Table 4

COMPARISON OF USE OF TRAINING METHODS BY TRAINERS, TRAINEES, EDUCATORS, STUDENTS, AND INDUSTRY

Trainers n=61	**Rank**	**Trainees n=92**	**Rank**	**Educators n=128**	**Rank**	**Students n=29**	**Rank**	**Industry Report**
Simulations	1	Lecture	1	Lecture	1	Lecture	1	Videos
Lecture	2							Lecture
Films/ Video	3							1-on-1 Instruction
Peer Tutoring	4							Role Plays
Seminars/ Workshops	5							Games/ Simulations
Coaching/ Mentoring	6							Case Studies
CAI	7							

However, lecture was the second most used method by professional trainers, even though it was ranked as not effective by them. Of the 18 methods ranked in the Industry Report (see the complete list in the References), only the 6 methods listed in Table 4 are used by over 50% of the 1,194 respondents who participated in the industry survey. There appears to be notable similarity between the findings in these studies and in the 1994 Industry Report.

CONCLUSIONS AND IMPLICATIONS FOR THE CLASSROOM

The training methods which seek to provide one-on-one instruction (supervised on-the-job training, peer tutoring, coaching/mentoring) appear to be effective with students in business and education. This finding is significant in that it stresses the importance of and support for school-to-work transition strategies, such as cooperative education, tech prep, mentoring, job shadowing, and the recent School to Work Opportunities Act. The business and marketing education classrooms are the unique laboratories for in-depth investigation of these methods.

Other findings in the complete study support the continued use of traditional classroom methods--role playing, case studies, and simulations. The overriding concern for educators is student learning; sensitivity to how students learn best may mean that more than one mode of instruction should be used.

Additional studies should seek to determine exactly which methods are effective in various subject areas. The diversity of classes taught by business and marketing educators presents an unparalleled opportunity for the investigation of teaching methods.

A study of the relation of learning styles and effective instructional methods may be another way to determine how to impact student learning, retention, and internalization of teaching materials. Gardner's multiple intelligences learning theories (linguistic, logical-mathematical, spatial, bodily-kinesthetic, musical, interpersonal, and intrapersonal) could provide the runway for exciting, dynamic research in the business and marketing classrooms (Armstrong, 1994).

The recent literature on training methods appears to be focusing on newer, just-in-time kinds of software-based techniques in which learners bring the subject matter to their desks *when* and *as* they need instruction (Perelman, 1994). What implications will this have for the business and marketing classrooms? Three methods related to machine-mediated instruction--interactive video, CAI, and CBT--were ranked as effective by trainees and students in these studies.

Regardless of the teaching methodologies used in education or business, students' motivation to learn may have nothing to do with methods utilized. The strength of business and marketing education has been defined by the professional educators who continue to update, upskill, and model the skills, knowledge, and attitudes needed in the evolving workplace--all of which may be more important than the methods used in the classroom.

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Implications of Site-Based Management for the Preparation of Public School Teachers and Administrators by Colleges of Education

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Refereed Paper

Running Head: Site-Based Management

This report describes a study commissioned by the University Council on Teacher Education, College of Education and Psychology, North Carolina State University. Support for the study was provided by the North Carolina Department of Public Instruction.

Implications of Site-Based Management for the Preparation of Public School Teachers and Administrators by Colleges of Education

Abstract

The purpose of the study was to investigate changes that had taken place in schools and school systems in response to state legislation concerning site-based management. Participants in the study were teachers and administrators who had substantial experience with efforts to implement site-based management in three counties in central North Carolina and who were perceived by their peers as leaders in restructuring efforts. Using qualitative methodologies, participants were interviewed to determine how site-based management had been implemented in their school systems, what significant experiences most affected the development of these leaders, what lessons these leaders learned from their experiences, what professional development activities prepared these leaders for restructuring, and what recommendations these leaders had for improving the educational programs of future teachers and administrators to better prepare them to function in site-based management environments. The results included a developmental profile for developing teachers and administrators to work in new environments and six major recommendations for the improvement of preparation programs in Colleges of Education

Implications of Site-Based Management for the Preparation of Public School Teachers and Administrators by Colleges of Education

Background of the Study

The University Council on Teacher Education, an advisory body to the College of Education and Psychology at North Carolina State University, commissioned a study of site-based management (SBM) in the public schools for the purpose of identifying significant implications for the preparation and continuing professional development of teachers and administrators. The general intent was to examine the changes in the organization and operation of schools in response to the adoption of Senate Bill 2 (SB2), the School Improvement and Accountability Act, in 1989 and the Performance-Based Accountability Program (PBAP) in 1992 by the North Carolina Legislature. The overarching goal was to assess the impact of those changes on teacher and administrator preparation programs within the College of Education and Psychology. Council members were asked to recommend individuals to serve on a Study Group which would develop specific research questions to be addressed. A Study Group was subsequently formed and met twice to deliberate issues related to this area of inquiry. A report from the Study Group was presented to the Council which included: (a) a brief statement intended to express the philosophy with which the committee believed the project should be approached, (b) a working definition of the term site-based management, and (c) a list of research questions to be investigated in the proposed study.

Subsequently, interest in the proposed study was expressed by the North Carolina Department of Public Instruction (NCDPI) and a contract was developed between NCDPI and the College of Education and Psychology to conduct the research. The contract was expressly designed to support a study of site-based management by the College of Education and Psychology in collaboration with three local education agencies: Granville, Johnston, and Wake County Public School Systems. It was agreed that a final report was to be submitted which contained the data collected, generalizations supported by the data, and specific recommendations for incorporating critical site-based management concepts into licensure preparation programs. Additionally, it was agreed that the findings would be shared with the State Board of Education and the Teacher Training Task Force created by the state legislature.

Purpose of the Study

The purpose of the proposed study, as described by the University Council, was to investigate the changes that have taken place in area schools and school systems in response to state legislation concerning site-based management. Research questions developed by the Study Group, listed below, were used to provide specific direction to the investigation. Implicit in each of the questions was the concern for identifying the implications for teacher and administrator preparation programs in institutions of higher education, particularly those in the College of Education and Psychology at North Carolina State University. The target group of individuals [illegible] whom the questions would be directed were teachers and administrators in Granville, Johnston, and Wake Counties who had substantial experience with efforts to implement site-based management in their schools or school systems, both positive as well as negative, and who were perceived by their peers as leaders in restructuring efforts. The theoretical framework which supported the design of the study was the philosophy and research associated with experiential learning and the concept that educational leaders can be developed by providing meaningful learning experiences at strategic points in their preparation. Consequently, the second and third research questions were of greatest concern because of their potential to help College faculty members evaluate existing preparation programs and design significant developmental experiences for teachers and administrators.

1. How has site-based management been implemented in the public school systems of Granville, Johnston, and Wake counties? What definitions have evolved, what strategies have been employed, how have roles changed, what changes have occurred, what barriers have emerged, and what overall impressions do educators have of SBM?

2. What were the most significant experiences with site-based management encountered by leaders in school restructuring during their development as leaders?

3. What were the most critical lessons learned by restructuring leaders from each of the significant experiences they encountered with site-based management?

4. What professional development activities prepared restructuring leaders for site-based management?

5. What recommendations did restructuring leaders have for improving the educational programs of future teachers and administrators to better prepare them to function in site-based management environments?

4. Overextension: When new information appeared to be highly divergent from the emerging categories.

In this study, the second and third criteria actually determined the end of the data collection phase. The resultant data achieved a remarkable level of stability and it was clear that additional interviews from participants in the three counties involved would not produce substantial contributions to the data base.

Procedures

The Study Group appointed by the University Council was responsible for the overall direction and management of the study and specifically identified and approved participants to be interviewed, monitored the progress of the research, and approved a preliminary report before it was presented to the University Council. Dr. Beckey Reed, of Ahlgren Associates, was employed as a consultant and was responsible for the actual field research, including communications with participants once they were identified by the Study Group, data collection (interviewing participants), and data interpretation. Dr. Reed was also involved in preparation and presentation of a preliminary report to the University Council and in preparation of the final report.

An interview protocol was developed by the principal investigators and approved by the Study Group before data collection commenced. The protocol incorporated interview questions directly pertinent to the research questions, as well as introductory and summary items. In addition, an audit trail was maintained by Dr. Reed to ensure the trustworthiness of the interview process.

All interviews were conducted via telephone and were recorded with the knowledge and consent of the participants. During each interview, Dr. Reed took extensive notes by hand and interpreted them as soon after the interview as possible. A subgroup of the Study Group was identified to work with Dr. Reed during the data interpretation phase of the project. This subgroup consisted of several teachers and administrators who had not been involved in conducting any of the interviews. Debriefings were held periodically with members of the subgroup to provide opportunities for the investigator to validate her evolving perceptions, ask and answer questions, and consider subsequent steps in the process. This standard qualitative practice served to provide additional insights, as well as a check against potential biases of the individual responsible for data collection.

Data Analysis

The guidelines identified below were utilized during the analysis and interpretation of the data collected in this qualitative study of site-based management.

1. Dr. Reed assumed primary responsibility for intuitive, evolving analysis of the emerging data base. In addition, she teamed with a subgroup of the Study Group for the purpose of validating her perceptions and interpretations in the data analysis process. This procedure served to reduce the effect of interviewer bias and provided additional, and highly meaningful insights.

2. The language of the persons interviewed was preserved to the maximum extent possible.

3. A computer was utilized to facilitate the text management aspect of the data analysis process.

4. Dr. Reed and the subgroup of the Study Group, through intuitive and inductive reasoning, sought to determine prevalent themes in the data reported and identified and coded the types of site-based management strategies, significant experiences, lessons learned, professional development activities, and recommendations for future teachers and administrators reported by the participants.

5. Recommendations to the College of Education and Psychology based on the findings of this study were developed by the principal investigators in collaborative meetings with the entire Study Group and were then presented to members of the University Council.

Results and Discussion

In this section, the results of the intuitive analysis of the open-ended interviews with the restructuring leaders are reported and discussed. The original language of these leaders is captured where appropriate and is included in quotations. Actual interview questions addressed by the participants are described immediately prior to the summary and discussion of their responses.

Description of Site-Based Management

The restructuring leaders were asked to describe site-based management as it was currently being implemented in their schools and school systems. These descriptions created settings for understanding their experiences and the lessons they learned. Respondents briefly explained the processes being implemented in their schools and school systems, including explanations of their specific roles. They also shared information about resulting changes in their schools and specific examples of the impact of site-based management. Finally, they were asked to identify major barriers to effective implementation of site-based management and describe their overall impressions of site-based management.

SBM Process Definitions

Site-based management is a framework for employee involvement in decision making through formal and informal processes. As described by the restructuring leaders in this study, site-based management is implemented in North Carolina as prescribed by law, yet is emerging in many different forms and different schools are developmentally at very different stages.

The philosophy underlying site-based management is "decision making implemented closest to the operative level with stakeholder involvement." This decision-making and planning involves "teachers empowered at the building level, central office staff who facilitate or serve as brokers or path pavers for the school, restructuring of resources, and involvement of constituent groups."

Site-based management is a "management system which uses a decentralized, shared decision-making process involving collaboration and cooperation of teachers, parents, community, administrators, and other school staff." The catalytic mechanism for the implementation of site-based management is the requirement for School Improvement Plans mandated by state legislation, although School Improvement Plans do not automatically produce site-based management. The self-renewal process of the Southern Association of Colleges and Schools (SACS) influences implementation efforts in some schools, while the tenets of Total Quality Management (TQM) drive other efforts. Site-based management has much in common with TQM as it is an "inclusive" process which seeks to involve all relevant groups.

SBM Implementation Strategies

Site-based management is generally implemented through a "team" concept, beginning with an overall school committee comprised of teachers, administrators, parents, and students who share responsibility for decisions within their jurisdiction at the building level. While they perform similar functions, these teams operate under different labels in different schools and are referred to variously as Lead Teachers, Leadership Teams, Administrative Teams, School Improvement Committees, and Core Committees. Myriad subcommittees operate to augment the improvement efforts developed by the overall school committee. Using a consensus model for decision making and planning, these committees manage resources (budgetary and personnel, where appropriate), curriculum issues, and instructional concerns at the building level. System-wide committees or councils also exist and operate to provide leadership at the county level. These committees include representatives from the many constituencies in the community affected by public education.

The site-based management efforts described by the respondents in this study reflect a developmental continuum which is indicative of the arduous nature of the restructuring efforts taking place in these three school systems. Some schools are still responding only minimally to the mandates of SB2 and the PBAP and one finds "participatory decision making in varying degrees." In other instances, one finds more evolved efforts in which system-wide collaborative endeavors have been developed, as well as remarkably innovative changes at the building level. There are also schools and school systems that have developed highly refined SBM processes which are functioning at a level of continuous reflection and reinvention.

Changing Roles of Educators

The roles of teachers and administrators in the school systems studied also reflected the developmental variation in site-based management which currently exists among schools and systems. Moreover, it was evident that such roles were highly dependent on the expectations established at a particular site (school or school system) at the beginning of a SBM effort. The restructuring leaders interviewed perceived that both teachers and administrators had dramatically changing roles and that those roles varied substantially depending on the leadership in a particular school or school system. It was interesting to note that many of the leaders interviewed reported that they had been involved in participative decision making in their schools prior to legislative mandates and they simply built on their previous experiences.

One of the goals of site-based management identified by the restructuring leaders was to create a "professional work environment" for both teachers and administrators. These leaders described scenarios in which teachers were provided secretarial assistance, thereby allowing them to focus more exclusively on teaching. Other leaders described exciting new roles they had assumed as team members involved in hiring new teachers and administrators, selecting textbooks, and making decisions concerning the school budget. According to these restructuring leaders, however, the most profound change in their roles was the fundamental premise of teacher involvement in decision making. These leaders held the firm belief that the advent of site-based management provided them with genuine opportunities to function as true professionals in their respective fields. Many participants reported a strong sense of empowerment which they felt enabled them to have greater impact in the improvement of their schools. They were absolutely convinced that by contributing to the generation of positive changes in their schools through teams, creative and viable solutions could be developed that one person could never conceive independently.

Teachers' roles. The respondents reported that the roles played by teachers in SBM environments were radically different from their traditional roles. They frequently characterized teachers in these situations as empowered, fully equal partners with the autonomy and flexibility to initiate change and take risks in the process. Where SBM was being implemented effectively, teachers were viewed as genuine leaders in their schools for the first time. In schools where the climate encouraged risk taking, positive innovations were occurring frequently. Rather than merely following the leadership provided by school administrators, teachers felt responsible and accountable to the total school community for making decisions to create change and then accepting responsibility for the consequences of their decisions. Learning to take risks, initiate change, and be held accountable for their decisions to the entire school not only revitalized teacher morale, but rejuvenated the entire school climate.

Repeatedly and passionately, the respondents emphasized the absolute necessity for teachers to be assertive and to articulate clearly their opinions on critical issues. Communicating with other adults within the school and learning to work collaboratively with their peers were actually new and radical concepts for some teachers. Since SBM requires the involvement of parents and community groups, teachers in these schools were called upon to develop public relations skills.

These new roles for teachers, which reached far beyond the parameters of traditional classroom settings and encompassed broader responsibilities for the operation of entire schools, required teachers to acquire knowledge outside the scope of their traditional teaching specialties. They discovered that they needed substantial amounts of new information in order to perform their new roles in relation to policy issues, budgetary decisions, personnel actions, and the management of school rules and regulations. Teachers found themselves in situations where they were in almost immediate need of substantial amounts of information pertaining to broad school issues with which they were unfamiliar and faced with decisions for which they were essentially untrained. Even in schools where initial inservice training was provided for teachers, the scope of the training was limited to the basic principles of site-based management and additional, much less continuing, inservice was not provided.

In order to carry out the many additional responsibilities assigned to teachers during the implementation of SBM, teachers devoted countless hours to meetings in which they attempted to address the many challenging problems and issues which they confronted. All aspects of the implementation process were described as being extremely time intensive, including planning and developing School Improvement Plans and Differential Pay Plans, serving on committees and subcommittees assigned to focus on the various goals of the school, achieving consensus on important issues, and communicating with colleagues at all levels in the organization. Respondents reported that release time for teachers to accomplish these new responsibilities was virtually nonexistent. Consequentially, these responsibilities became additions to their already demanding schedules and frequently these meetings were held at the end of long school days.

Administrators' roles. Administrators in SBM schools, as one restructuring leader reported, are now perceived as "co-educators" who are responsible for providing the leadership to facilitate site-based management efforts. The new definition of their roles required important shifts in power and authority to teams of professionals within the schools. The roles of experienced building level administrators and central office staff have changed from rather authoritarian and bureaucratic roles, to roles which require them to function as "managers and mediators."

A different leadership style is required of administrators in site-based management. Administrators at all levels must lead by facilitating constituent groups and helping often diverse groups arrive at consensus on critical issues. The requirement to develop cohesive teams with the necessary communication and collaboration skills, and providing those teams with the knowledge bases needed to formulate decisions effectively, was thrust upon school administrators with only limited initial training.

"Mandated site-based management" as one leader noted, has required that significant amounts of time and effort be expended by principals and central office personnel on developing School Improvement Plans and monitoring the concomitant paperwork. Insufficient time lines established by the state have placed extraordinary demands on local school systems. The respondents reported that these inordinate demands actually defeated the process of site-based management in a number of cases. Restructuring leaders repeatedly described the substantial amounts of time required to build group consensus, to develop philosophy and mission statements, to establish goals and measurable objectives based on available data, and to implement successfully plans to improve schools in meaningful ways.

Changes and Innovations

As a result of site-based management, changes have occurred in the organizational structures of schools and school systems and in the management of available resources. Participatory management has resulted in increased involvement of constituent groups at all organizational levels of the school systems, which has in turn resulted in many innovative changes affecting curriculum, instruction, and management of human and financial resources.

Changes in the management of resources has allowed greater freedom and flexibility in making decisions at the building level. Block grants to schools have enabled teams to establish the priorities they believed to be the most important in meeting their established goals and objectives. The involvement of teachers in hiring other professionals has increased their knowledge and accountability in this area. As a result of placing the authority to make such decisions with those closest to the issues and most affected by the consequences, many schools have become dramatically more innovative.

An important impact of site-based management, as described by one restructuring leader, has been greater "inclusiveness and involvement." This inclusion and involvement has resulted in many highly innovative changes which have had very positive impacts on schools and the communities they serve. Many schools have altered their school calendars and daily schedules to accommodate better the needs of their populations. Curriculum changes at all levels were described by the respondents, who noted that new and different teaching strategies emerged when teachers were no longer obligated to use state mandated textbooks, but instead had freedom to select their own materials based on their own professional judgments. Faculties have changed numerous school policies and provided new extracurricular activities to meet the unique needs of their students; all with a greater emphasis on meeting the needs of diverse groups. Restructuring leaders frequently reported that site-based management had brought important, innovative changes to their schools and substantial revitalization to their staffs.

Major Barriers

The three major barriers identified by restructuring leaders were expectations regarding site-based management, staff time, and inservice training.

Understanding of expectations. The barrier most frequently mentioned by participants was a lack of understanding in regard to the expectations associated with site-based management. One restructuring leader indicated that "the missing piece in schools and school systems is a clear definition of site-based management and how it is being implemented, including a delineation of roles." Developing a common understanding of SBM and clarifying roles to prevent misconceptions and misunderstandings requires up-front discussions of the parameters for site-based management in specific settings. Without this common understanding, SBM efforts can be disastrous. SBM can even be used by some to "avoid decision making." Restructuring leaders indicated that it is absolutely necessary to "balance decision making between teachers and administrators." Interestingly, they also pointed out that even in a SBM environment, an effective administrator knows when it is necessary to make certain administrative decisions with or without team input. The restructuring leaders thought it important to understand that team empowerment results in an exchange of power or a diffusion of power to others, rather than a loss of power to anyone.

The respondents noted that teachers and administrators tended to be resistant to new paradigm shifts and, consequently, changing the attitudes of all constituent groups so they truly "bought-in" to site-based management had been a significant barrier. A "lack of trust" and "reluctance to take ownership of some tasks" was evidenced, as was "turf protection in content areas." Where present, negative attitudes of students and community groups had to be addressed directly in order for site-based management to be implemented effectively.

Expectations on the part of state agencies were also reported as barriers to the effective implementation of site-based management. Some restructuring leaders explained that the school improvement planning process had actually been a barrier to achieving the ultimate goal. Lack of clarity as to the state's expectations regarding waivers and written measurable objectives consumed enormous amounts of faculty time. The problems were exacerbated by faculty members' lack of knowledge concerning certain state rules and regulations.

Funding expectations were also identified as a major barrier to site-based management. During the initial implementation of SBM, funds were available for training and curriculum development. Lack of continuous funding has dramatically restricted staff development and other site-based management activities. There was also consensus among the respondents that the Differential Pay Plans had actually created more problems than they had solved. Inordinate amounts of time and effort have been expended by faculties trying to reach consensus on how to allocate decidedly small amounts of money. Some schools have chosen to allocate portions of this money for inservice training, which assisted them in meeting their school objectives.

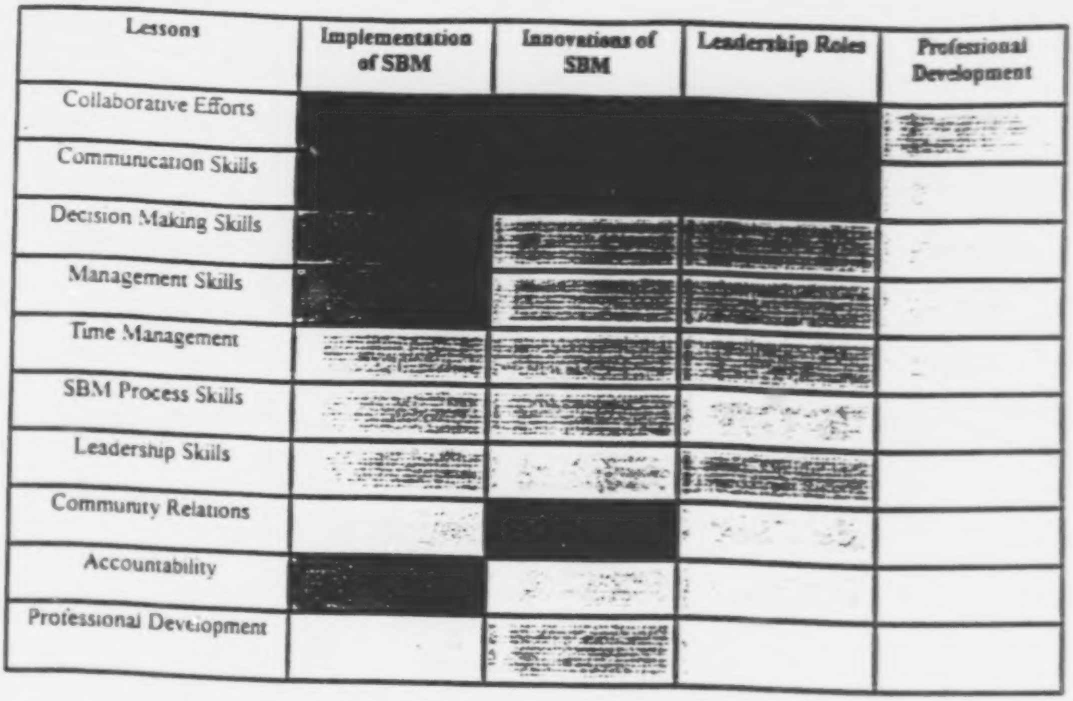
Inadequate time. Repeatedly, respondents indicated that time was a significant barrier to the implementation of site-based management. They described lack of time during the school day for activities related to site-based management and the extra time required after school hours for related meetings. Several restructuring leaders indicated the process and paperwork associated with the development of the School Improvement Plan, and the short time lines given for that development, forced teachers to take time away from their students. They indicated that many of the deadlines established by the state were unrealistic in terms of schools and school systems having adequate time to process the necessary information and reach consensus on important issues. This comment was indicative of their perception: "The process is so time consuming, the end product is lost."

Inadequate training. A lack of knowledge and/or training was frequently cited by restructuring leaders as a barrier to the implementation of site-based management. Many of the leaders reported a need for training in group dynamics, including collaboration and consensus building skills. They also felt they lacked an understanding of the theoretical background for site-based management, and did not have strong knowledge bases in areas such as curriculum and instruction, resource management, and general school administration.

Overall Impressions of Site-Based Management

The restructuring leaders interviewed in this study were overwhelmingly positive about the philosophical concept of site-based management. While they had experienced a variety of diverse experiences, including both positive and negative experiences, they reported that they strongly preferred this management paradigm to others they had experienced in the past. They perceived that positive changes had occurred in their school systems as a result of site-based management and that teacher and administrator morale was higher in the majority of instances. While they believed strongly in the concept, many restructuring leaders did not agree with all of the processes currently being implemented in their systems. They described substantial barriers, including confusion about expectations, and lack of adequate time and training. Repeatedly, respondents pointed out the vital need for additional professional development and the current lack of funds to meet this need.

> *I believe in site-based management and the philosophy of inclusiveness because it is inherently the right thing to do. It is consistent with how I believe people should relate to one another in their work settings and how they should be dealt with and included. I also believe in site-based management and the philosophy of shared decision making because, from a practical perspective, it generates better results for your organization.*
>
> *This is the only concept that will move us forward, move us from the traditional model of education we've been following so long. It's the only idea out there that has any merit at all. It has to happen! The current methods of implementing site-based management, however, doom it to failure. I don't know where that leaves us.*



Lessons	Implementation of SBM	Innovations of SBM	Leadership Roles	Professional Development
Collaborative Efforts	■	■	■	▨
Communication Skills	■	■	■	
Decision Making Skills	■	▨	▨	
Management Skills	■	▨	▨	
Time Management	▨	▨	▨	
SBM Process Skills	▨	▨	░	
Leadership Skills	▨	░	▨	
Community Relations	░	■	░	
Accountability	■	░		
Professional Development		▨		

Figure 1 Developmental profile of restructuring leaders.

Developmental Experiences

Based on their involvement with site-based management, the restructuring leaders were asked to identify experiences which significantly impacted the implementation of SBM in their schools or school systems and which significantly influenced their development as leaders in school restructuring. The personal developmental experiences that stood out in the minds of these restructuring leaders were classified into four categories: SBM Implementation Strategies, SBM Innovations and Changes, SBM Leadership Roles, and SBM Professional Development Activities. They are arranged in Figure 1 and presented in this section in order of the relative magnitude of their contributions to the development of the restructuring leaders interviewed in this study. The darker the shading in Figure 1, the greater the frequency of responses from participants.

SBM Implementation Strategies

More developmental experiences were reported by restructuring leaders in this category than in the other categories of experiences, making it the most information rich.

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Respondents shared both positive and negative experiences which were all part of the process of implementing site-based management in their schools and school systems.

Leadership styles. "SBM starts at the top with a superintendent who believes in and pushes the concept" said one leader. Another noted the "school board has to buy-in with actions as well as words." Still others noted that the "leadership of the principal is key." "Everyone must buy in" and "empowering versus imposing," were elements respondents considered essential to successful collaboration, and represented a theme respondents noted in regard to leadership styles they had encountered during their experiences implementing site-based management.

> *Where site-based management or participatory decision making is kept alive and always up-front in the minds of staff, it becomes a way of life for a school. Where that happens, it becomes an easier thing to do and the growth is steady. Now, some schools do that and some schools don't. I guess the most critical thing is that the leadership in the school has to be committed to the process and make sure that it becomes a way of life at the school, not a compliance function.*

Communication process. Respondents repeatedly indicated that it required intensive communication to implement a specific SBM plan. A respondent described many hours of hard work one team had spent trying to change the school lunch schedule, only to discover just before implementing the plan that it would not work. Another participant noted that a "lack of representation resulted in poor communication and no voice in the process." These leaders shared experiences which ranged from "ugly meetings where communication broke down," to site-based management becoming an integral part of the daily communication process through written bulletins and informal or formal team meetings.

> *Basically, all of our decisions are made through site-based management; we have a lead teacher meeting every week. The lead teacher group meets with the administration on a weekly basis concerning mainly curricular and budget issues, not just operational issues. It is just a really good system for getting information out, sharing concerns, and bringing concerns back to the administration so there is input and discussion on a lot of items without having to schedule that hour long faculty meeting on Wednesday afternoon where you only get fifty percent of the folks there. Teachers being members of a team makes them more apt to discuss things with their lead teacher, so we get more of the concerns as well as more of the suggestions through that process.*

Collaboration within the school and community. One restructuring leader indicated that SBM "reinforced belief in the positive traits of peers -- they took initiative when invited." Participants cited collaborative experiences which resulted in working with teachers in other disciplines and at other grade levels on specific projects related to site-based management. As a result of these efforts, they gained greater respect for their peers and continued to collaborate on other activities. Collaborating with parents and community groups was viewed by the respondents as an essential part of implementing site-based management.

> *Working in a school and being able to share, you become one family. And if you are one family, you share and you want everybody to feel good about him or herself. You work toward that. When you build up this morale, your school booms. It takes all of us to make that happen. And its not just the teachers, its the entire staff. Even our custodial staff works right along with us to assist the students in any way they can. For instance, if we need a buddy for a child they are right there and they do their part. The cafeteria staff is the same way.*

Budget process. Educators indicated that through implementing SBM they "learned to recognize the total needs of the school," not just the needs of their own programs or grade levels. One restructuring leader reported they had "saved money by sharing resources." Involvement in the budget process helped them "feel ownership in the school." However, participants acknowledged the need for them to understand adequately fiscal policies and procedures in order to utilize their resources to the maximum benefit.

> *In the budget process, teachers decide who needs what most. It is not this selfish attitude that I want a color monitor just to have a color monitor. We find out who needs what and we work toward that end. That person gets it. That's the sharing kind of thing we have.*

> *We decided each one of us could decide whether we wanted to use textbooks and how we wanted to spend money as far as resources in our classrooms. Just having that flexibility has made a big difference. It was quite a change when we could start making our own decisions as to how we were going to teach. With that, of course, came a lot of responsibilities and we've had to keep lots of documentation. I guess that accountability is a big issue.*

Planning process. Many restructuring leaders reported that a sound knowledge base is required to make plans and decisions in a SBM environment. Developing a School Improvement Plan and a Differential Pay Plan requires knowledge of areas in which typical classroom teachers are not well-versed. Classroom teachers require training in order to make informed decisions about school curriculum, instruction, and resource management (personnel and budget).

> *I think one of the things that has been most difficult about it is that we change tests every year. Then we're constantly having to revise our milestones and our plans because we keep changing the way the state or the school system assessed and that is real frustrating when the measures keep changing. Then you can't ever determine if you're making progress because you can't attribute any plus or minus to your strategies because changes could be attributed to the fact that you changed the measurement.*

> *I think the thing that is out of control with this is the amount of paperwork and the hoops that we have to jump through in site-based management. People will go through the motions of getting the stuff on paper, but the process that actually occurs may not be what it should be. The importance of site-based management is as much process as anything else. If it becomes a paperwork exercise, the meaning of what should occur will not be there.*

One restructuring leader stated emphatically "we are charged with teaching students -- SBM planning is secondary." Many restructuring leaders noted that development of the School Improvement Process was so time consuming, it "bogged down" the actual implementation of SBM. Still others indicated they were "writing a plan, but not spending time implementing the plan."

SBM Innovations and Changes

Experiences in site-based management which resulted in innovations and changes within the school or school system represented the second category of experiences reported mostly frequently by restructuring leaders. Their involvement in having a real impact on their schools and school systems stood out vividly in their memories.

School operations. Restructuring leaders' experiences in changing the operations of schools or school systems included the following areas: school calendars, daily schedules, curriculums, policies, facilities, and climates. A comment made by one leader was indicative of the general tone of the responses: "You don't have to sit back and accept things the way they are -- you need to speak up."

Restructuring leaders indicated that changing the school calendar created a sense of "oneness" within the school. Faculty, students, and parents worked together to implement this change to allow greater opportunities for students. At the same time, these educators learned a great deal about the complexity of making administrative changes which met the needs of all constituent groups.

> *Trying to change the schedule was one of the first ones, and what happened, the significant thing that I remember was, that brought this faculty together because everyone had an opinion about it and everybody got passionate about it. For the first time I saw people working together, and pulling together, and people doing research, and people coming up with justifiable reasons for what they thought. I saw people beginning to do what I consider critical thinking and justifying their positions. What I learned from it was, you don't go into something that you're trying to get group consensus on without doing your homework and being well-prepared.*

Understanding the needs of students helped many leaders develop alternative curriculums, extra-curricular activities, and rules and regulations which better met the needs of students. The flexibility of site-based management, plus the collaborative approach to leadership have resulted in many innovative programs being developed for students.

> *We also realized we had a problem with students being tardy to class and we had a faculty group get together. A group of teachers created a tardy center and a tardy policy for kids reporting. Very structured, outlined exactly what was expected, and it was implemented by the faculty. It has really worked; it cut down our tardies. Teachers have been really proud of the fact that we thought of this, we came up with it, we set the policy and the rules, and it has worked.*

> *One of the highs I have gotten out of this is working with some students in a weekly tutorial program that I've implemented at the school. We were also able to get an activity bus for some new students who live in another area and wanted to be involved in activities after school. Now we have many students who are involved in clubs and sports, and who really want to do things. We also started a club for all students, but set it up in a way that gave African-American students some ownership in the school, which was a strategy in our site-based management program. By starting the tutorial program, getting the activity bus, and getting the club, we've been able to provide students with some ownership. They were saying before "you don't want me here." Now that has changed and the attitudes of these students has improved greatly.*

New perspectives. Respondents also noted the profound significance of the changing roles and perspectives of central office personnel, principals, and teachers; as well as those of parents and the community. "People are willing to listen and communicate about a plan that includes them." One leader described the challenge in simply changing the nature of meetings from "information sharing to interactive exchange of ideas."

> *One of my roles is to coordinate buses and we are really hurting for drivers. The principal thought let's bring that to the Team. So, I started it off by explaining that*

> *we were trying to come up with some strategies where we could recruit and retain bus drivers. The teachers just sat there and nobody had anything to say. So, the principal said "that's that." I said no it's not, this is the Team and we need to talk about this since it affects our school and our children. I guess the teachers hadn't bought in to this because they don't look at bus drivers as being part of what they have to deal with and they don't see that bus drivers have anything to do with the learning process. But the bus drivers are very important because we need reliable people to get the kids here. If the kids are not here, then we can't teach them. I guess the lesson I've learned is that even though it may be a major part of the school system, if people don't deal with something directly, they don't see the importance of it.*

Leadership Roles

Restructuring leaders identified developmental experiences in which they had been elected or selected for leadership roles in their schools or school systems almost as frequently as they identified experiences in which they had made an impact on their schools. The leadership roles included chairing school committees, hiring new teachers and administrators, and leading school restructuring efforts. Respondents often noted that additional information or training would have assisted them in serving in these leadership roles.

Chairing school committees. Restructuring leaders had served as chairpersons of numerous committees, including the overall school committee and numerous subcommittees. These activities were pivotal experiences in their development as leaders. Their experiences with these committees included both positive and negative events. Innovative solutions to curriculum issues, discipline problems, and student activities were generated by these committees, and restructuring leaders frequently reported that "those closest to the issues generated the best solutions." Access to information, including state laws and local policies, as well as understanding of administrative issues were vital to respondents when serving in these leadership roles, as were strong collaboration and communication skills.

> *The biggest impact that chairing the alternative schedule committee had on me was that I was not aware that it was possible for staff members to act in such a way as to have a significant say so in terms of their own environment. The experience was extraordinarily significant. The thing I remember most about it, the lesson I learned from it, was that if you've got the right people in the right place at the right time, there is very little that can't be accomplished. As long as you don't end up butting up against rules and regulations and laws that prohibit you from doing so. We managed to create an awful lot of new stuff in a very short amount of time.*

> *Chairing the Differentiated Pay Committee has probably been the most frustrating and least rewarding experience because there are so many rules and regulations. Also, it took so much time and the amount of money was so little for the number of hardworking teachers. It couldn't be across the board, it had to somehow be merit gain and we were trying to come up with something that everybody could access equally. We probably came up with a plan that's too complicated, trying to give everybody their fair shot at part of it."*

Hiring new teachers and administrators. Many participants who served on selection committees to hire new employees were involved in this process for the first time. These experiences represented an area where educators felt a strong sense of accountability for their final decisions. They had vested interests in the success of new personnel in their schools. Being involved in the hiring process helped "establish camaraderie with the new personnel."

> *This teacher candidate was just out of school, he was young, and he was saying that he knew he was probably not really good, but he was going to be really good. He was so enthusiastic and you could just tell that he really, really wanted the job. I remember thinking that he didn't have as much experience as all the other people, but I liked his attitude. I remember it was neat to have input, to say these are the things I really like about this person and I think he will bring energy and enthusiasm into our department. And he got the job! My principal agreed! He's turned out to be wonderful. He took over the Advanced Placement (AP) course and just about everybody in his class last year got college credit for the AP test. I feel good knowing that I helped pick him. And, I think that helped me work better with him. He wasn't just somebody that came in at the beginning of the year. You feel more protective of them, or helpful towards them.*
>
> *I was involved in the interviewing process for the new assistant principal. That was not an easy job for me. I'm a very emotional person and sometimes I have trouble putting my head before my heart, and I didn't particularly like doing that. I felt it was too much responsibility for me, even thought it was not my sole responsibility. Sometimes I felt that the responsibility was too great and I was afraid of the repercussions. What if I made a bad decision? What if what I thought really wasn't right?*

Leading school restructuring efforts. These leaders had a variety of experiences leading restructuring efforts in their own schools. Some had been involved in consolidating faculties from several schools into one faculty, several had implemented whole language instruction into their curriculums, and others reported their involvement in creating more professional environments.

> *As the principal, I thought it was important that I back way off and not influence what happened during the SBM process. Those poor teachers floundered forever. They went through pain that they should not have had to experience. They went through being intimidated by one or two teachers. They went through worrying about hurting each other's feelings and not knowing when to speak up. They told me later that I really let them down, that they needed me more involved than I was. I guess that gets back to knowing when to step in and when to step out. People look for leadership, but they don't look for dictatorship. As an administrator, you have to be involved, you can't just say go forth and do it. That was probably the most profound thing that I learned.*

Professional Development Activities

While fewer restructuring leaders identified these types of experiences, as compared to the other categories of developmental experiences, professional development activities were described by respondents as being highly significant. Throughout the interviews, restructuring leaders repeatedly indicated that lack of professional development was a critical barrier to implementing site-based management effectively.

Leaders indicated that initial inservice training in site-based management had been meaningful and beneficial experiences for them. These professional development experiences included training in site-based management processes, leadership training, and highly constructive discussions among teachers and administrators focusing on the missions and beliefs of their schools and school systems. Several respondents reported that they had attended meaningful retreats where, for the first time, they had open and honest communication with their colleagues about the goals and objectives of their schools, as well an opportunity to share their various philosophies of teaching.

> *After attending a retreat on effective schools, I learned new ways of looking at things. I had my eyes opened to a whole lot of information that I had never been exposed to before. We get so bogged down in the day to day routine that it's hard to see the big picture. I think that was the first time that I really started thinking about what I believed and what was really going on. Also, that was the first time I think I really learned the value of the involvement of parents. Until that time, I really did not understand how parents and the community could really be positive parts of the process.*

Other leaders reported that visits to other sites; including other schools, businesses, and industries; or an exchange of ideas with persons located elsewhere had helped them reinvent their schools as they began to implement SBM. These experiences provided them with opportunities to change the operations of their schools by emulating the highly effective practices of other organizations.

> *Now, administrators have been doing this for ages, but teachers have never done this before. Our committee visited a particular school to observe something, but they weren't doing that thing the way we perceived it should be done, so we wrote our own plan. While we were there, however, we saw some really neat things we thought another committee might like. The other committee got excited and sent teachers to see what we saw. I found it very exciting to be in someone else's school and see how they handled some of the same things we did and compare their perceptions to ours. The idea that we can go searching for better ideas, that we can get a small idea and investigate it by talking to other schools and then creating something new and different is exciting. I think it has a lot of possibility for the future.*

Other leaders indicated that a "lack of training created a cascade of problems and issues." Clearly, lack of funding for staff development has become a major impediment to the successful implementation of site-based management in many schools.

> *People just don't know what it means, how to do it, and are not trained in how to work with other adults. They run into brick wall after brick wall because they have to deal with adults now; running meetings and trying to reach consensus. How do you have a good argument? Our people were not ready to handle all the stuff that came down with this. It really goes back to the fact that you cannot train too much. Not just in terms of definitions, but you have to decide on a model of how to decide who decides. You have to take time to build a process. You've got to take time to train the people to be effective leaders and followers, how to be on a team, and how to reach consensus without arguing and getting mad. Training really needs to be a focused effort.*

Lessons Learned Through Developmental Experiences

The restructuring leaders were asked to reflect on their developmental experiences and elaborate on the critical lessons they had learned from those experiences. The lessons the leaders learned from their experiences were categorized into the ten areas identified in Figure 1 and described in the following section, also in the order of the relative magnitude of their contributions to the development of the restructuring leaders interviewed in the study.

Collaboration Skills: These lessons included the skills adults need to work with one another in team environments within their schools and school systems.

> *Stick with the process. If you are going to have participatory decision making, you've got to get the participation before you ever start the decision making. If you don't do that, you're going to have to go back and do damage control. It takes much longer to do that than it does to stick to the process initially. People have got to be kept involved and informed. People do tend to support what they help create. You bring them along by staying with the process of input and feedback. It takes time, but when you don't do that it takes more time in the long run. Pay now or pay later. When you pay later, you pay interest . . . always.*

Communication Skills: The lessons learned here related to verbal and written communication skills, as well as effective listening skills.

> *One of the major things we had to do was to learn to listen to others and accept differences among people. You have to learn that everyone will not always agree with your ideas and that you don't get hostile when that happens. When disagreement occurs, you still have to be able to talk about those things and sometimes you can bring others around to see you're trying to get away from traditional activities because of the population that you're working with now. We are all different, but we can accept those differences and move on in a positive direction.*

Decision Making Skills: These lessons focused on the ability to make sound decisions based on the information available.

> *As an administrator, what I learned was that when we started doing SBM, I was getting a lot of good feedback from the staff. Kind of a wow, this is really neat. You mean you're really going to let us decide this stuff? We don't mind meeting until 5:30 if we're really doing something. Those reactions are short-lived and they learn the reality real quick. They realize how much work it is and that it takes a lot of time to do all this good stuff. They have these meetings and make these decisions, and sometimes they wish they weren't even on the leadership team because they start to catch some of the flack for the things that get done. They find themselves having to make tough decisions that affect real people.*

Management Skills: These lessons were related to basic management and administration skills needed for smooth operations in public schools and school systems.

> *Learn how to delegate without feeling guilty. That's probably a hard lesson for teachers because they are so used to being independent and doing everything themselves and counting on themselves to get things done. Don't feel guilty about delegating what they signed up to do anyway.*

Time Management Skills: The lessons learned here were primarily in relation to the inadequate time available to function effectively in a site-based management environment and the criticality of time management skills.

> *Teachers are giving up their planning time, their afternoons, and their nights to be mini-administrators. We do not have a structure in place where teachers are allowed the time to do this extra work. If you're serious about site-based management, there needs to be a cadre of individuals in a school who have significant release time, as in a lead teacher model. You just can't ask teachers to do these new things without giving them time to do it.*

SBM Process Skills: These lessons were specifically indicative of the skills needed to respond to the mandates of the School Improvement Process, including both planning and implementation phases.

> *The process can't be rushed. Real change involves consensus building and that's a very time consuming process. I learned through this process that unless people believe in their hearts, change isn't going to happen. You can't mandate the type of change we are talking about. The time and energy we expended coming to a consensus about what we believe and what vision we have for our school was very necessary and created a strong base for us to proceed. Translating beliefs and vision into concrete changes is equally time consuming.*

Leadership Skills: The lessons in this area pertained to the importance of leadership and motivational skills in site-based management environments.

> *The leader is just so, so important. There is a real paradigm change, however, from the supervisory model, which I had been taught, to a team model . . . much more participatory. In the supervisory model, you are in charge of it all, give directions, and follow up all the time. That appeared to be power, but in essence it was not. Actually, when I share my power I think I have more power. But the fact is a leader must be a leader . . . the leader guides, the leader massages, the leader provides challenges, the leader doesn't let the team stop growing.*

Community Relations Skills: These lessons were associated with skills professionals need to work with groups outside the school, including parents, school boards, advisory councils, and representatives from business and industry.

> *I was talking to people who were talking about businesses, community life, and different cultures. It was a really exciting experience. It was what I had always imagined that being in a board room must be like. Disagreeing, arguing, compromising, researching, and coming up with something really special that would have extremely positive educational value and change our lives and the lives of the persons that we were teaching and touching in the community. This was really the height of what site-based management is all about.*

Accountability: Being accountable for the consequences of their decisions and actions were lessons learned in this category by restructuring leaders.

> *It's important to acknowledge and celebrate success. Where that happens, people tend to be more supportive. But you've got to be able to see some success as a result of all this energy and activity involved with site-based management or participatory decision making. You've got to see some successes and some results. That has to be recognized and, for lack of a better word, celebrated.*

Professional Development: These lessons addressed the need to include meaningful professional development activities during efforts to implement site-based management.

> *We were going to redesign the schedule, and we were also going to redesign our instructional delivery and I don't think we had the follow through on that. We got caught up in the showy things, the changing of the schedule. And it looks good that you're doing something, but when the teachers shut their doors, even though we've gone to longer periods now, I don't think a lot has changed in their classrooms. The teachers who lectured before still lecture. The teachers who did worksheets still do worksheets. We really fell short as a system on that because that's another area that we were promised some staff development that we did not get.*

Professional Development Activities of Restructuring Leaders

The restructuring leaders were asked to describe any professional development activities in which they had been involved that prepared them to function effectively in a site-based management environment. For organizational purposes, these are presented as preservice activities and inservice activities.

Preservice Activities

A distinct minority of the restructuring leaders indicated they had experienced any preservice activities which prepared them for their encounters with site-based management. Of those activities that were identified, most were associated with graduate courses and were more theoretical than applied in nature. One respondent reported cooperative learning activities from group projects, another identified college leadership roles, and still another indicated that decision-making skills learned in the armed forces had prepared that person for site-based management.

Inservice Activities

A majority of the restructuring leaders indicated they had participated in initial inservice training related to site-based management. Many of these experiences were informational sessions relating to School Improvement Plans, Outcome Based Education, and basic site-based management processes. Others described very positive retreats which focused on site-based management, but did not include implementation issues. Other restructuring leaders noted that inservice was "contrived and not transferable."

Other activities included leadership training, learning from experience, peer coaching, mentor training, business and management training, and visits to other sites. Restructuring leaders indicated, however, that "additional inservice had not been provided." Respondents commented throughout the interviews on a significant lack of training in site-based management. While site-based management began with some intensive inservice activities, funding constraints had seriously limited continuous training activities.

Recommendations for the Preparation of Future Educators

Restructuring leaders were asked for their recommendations to improve the preparation of future teachers and administrators by better preparing them to function in site-based management environments. Their responses are summarized in the following sections.

Skill Areas Recommended

The recommendations from the restructuring leaders closely paralleled their developmental experiences and the lessons they learned from those experiences. In priority order, the following skill areas were recommended: collaborative efforts, communication skills, decision making skills, leadership skills, management skills, SBM process skills, and time management skills. These are identical to seven of the ten critical lessons learned by the restructuring leaders during their own development.

Participants most frequently indicated that educators need to develop collaboration and consensus building skills. Understanding the human issues involved in group dynamics was noted repeatedly. Learning to be team players who understand diversity is essential to site-based management, as is conflict management. Effective meeting and facilitation skills were recommended for improving group processes. Communication skills were also identified as important by restructuring leaders. Respect for the opinions of others and effective listening skills were cited specifically. The inclination to be more interactive and to speak out with confidence should be developed in future educators. It was suggested that students learn to "talk about their beliefs as well as write about them."

Decision making and problem solving skills were also identified by the restructuring leaders. Role playing real issues by allowing students to interact with one another was suggested by several participants. Another recommendation was to include in courses "structured problem-solving activities with stringent time parameters." Students need to learn "how to deal with situations and problems that cannot be resolved," or as another respondent said "occasionally, give them opportunities to fail." It was also suggested that the SBM process be used in the management of the College in order to involve students in decision making.

Leadership and management skills were frequently cited, including developing understanding of different leadership styles, developing motivational ability, and the ability to manage people, organizations, and stress. General business courses and courses in total quality management were suggested.

SBM process skills were also recommended and included developing understandings of state policies and regulations, especially related to hiring and budgeting practices. Learning to write measurable objectives which reflect the intent of the schools' mission and beliefs was emphasized, as was including time management training as an important aspect in the preparation of future educators.

Techniques Recommended

Restructuring leaders recommended that the basic philosophies communicated to students, or "frames of mind," need to be less traditional. Having students monitor emerging issues and trends through research activities and reading current literature on school leadership were suggested as possible techniques to use with students. Closer involvement with the public schools was also suggested in order for students to observe site-based management in action. Restructuring leaders recommended that "the governance of the College of Education and Psychology should reflect SBM."

> *I have found that new teachers coming out of the university are hesitant about sharing their ideas. They may be overwhelmed by the fact that they are in public school and it takes them two or three years to get their feet on the ground. I think the universities tell them that when they get to the schools they should not say too much, just listen and try to absorb everything. But they have wonderful ideas about people, about children, and about how people interact even though they don't have any classroom experience. The main thing is to be open and willing to share your ideas with others. They need to be more interactive when they come into the schools because they have a lot of good ideas and they need to share.*

The most strongly recommended technique for preparing future educators for SBM was through innovative field experiences. Observing faculties meeting on SBM issues, seeing models of successful SBM schools, and actually being involved in the SBM process were examples of things that could be incorporated into such field experiences. Shadowing effective educators in SBM environments was another related recommendation.

> *I really think that so much of it is being there and going through the process. Working through it and being a part of it is so much of what is involved. The whole key of them understanding is the people skills. The more involved they are with faculty, and the more a part of it the faculty members are, the more they will understand. Whatever those people skills and communication skills are, that's what you are shooting for.*

Conclusions and Recommendations

After examining the findings of this qualitative investigation, members of the Study Group met to discuss the implications of these findings for teacher and administrator preparation programs in the College of Education and Psychology. Together, they formulated the following recommendations and presented them to the University Council on April 21, 1994 in context of reporting on the entire project. The University Council accepted the recommendations at that meeting and forwarded them to the administration of the College of Education and Psychology for deliberation.

Recommendation 1: Raise the awareness of College faculty and administration regarding site-based management through professional development activities.

Members of the Study Group concluded that an important starting point for the College's efforts to respond to the site-based management movement would be to ensure that all faculty and administrators understood the concepts, skills, and values involved in effective site-based management. Some form of professional development should be designed and implemented for College faculty members and administrators which would not only raise their awareness of site-based management, but would also prepare them to respond to the second recommendation of the Study Group. Such an approach would essentially emulate the more successful efforts at implementing site-based management in the schools and school systems that participated in this investigation. While the Study Group did not prescribe a particular form for this professional development experience, several interesting ideas were discussed. Among them was the idea of the College sponsoring a distinguished lecture, or perhaps a lecture series, in which one or more nationally renown scholars in the field would be invited to address faculty members, administrators, and students. Another idea that emerged was that of creating a panel of local restructuring leaders, including both teachers and administrators, who have been involved in successful site-based management efforts in the immediate area and holding a panel discussion with the faculty, administrators, and students of the College. Based on our experiences in conducting this study, restructuring leaders in the area would be very interested in participating in such an event, are extremely knowledgeable about the subject, and are not reticent about sharing their experiences, both positive and negative. A panel discussion of this type may also provide an avenue for beginning to establish a network involving the College and a number of area schools which would facilitate the implementation of many of the Study Group's recommendations.

Recommendation 2: College faculty and administration should model and exemplify for students the basic principles of site-based management.

While recognizing that the intent of this recommendation is probably already manifest in some departments and programs within the College, the Study Group felt strongly that the College faculty and administrators should comprehensively examine the extent to which such practices are present in all areas and at all levels within the College. Such a self-examination should involve all stakeholders within the College and should address the amount and nature of variation among different areas of relevant College activity, the specific opportunities that exist for students to observe and reflect consciously on model practices, and the degree to which students are actually involved in management activities within the College. Based on this self-examination, the College will be able to redesign management practices, where needed, to reflect more accurately the tenets of site-based management and create new opportunities for students which would better prepare them to function effectively in site-based management environments. In other words, the Study Group recommends that the College of Education and Psychology actually implement site-based management for the benefit of its students.

Recommendation 3: Review existing undergraduate and graduate curricula for both teachers and administrators and infuse site-based management competencies as appropriate.

The profile of developmental experiences and critical lessons learned from those experiences by the restructuring leaders who participated in this study provides the framework for implementing this recommendation. In essence, the lessons are competencies for the preparation of educational leaders and can be used conveniently by faculty members to examine the extent to which these competencies are addressed within their various programs. In the event that certain competencies are not addressed in a particular curriculum, faculty can infuse those competencies in a manner most appropriate for that particular curriculum. Perhaps more importantly, the categories of developmental experiences can be used by faculty to evaluate existing and design new developmental learning experiences for students for the purpose of developing or reinforcing the competencies experientially and, therefore, better preparing them to function as teachers and administrators in site-based management environments. Study Group members believed strongly that students should develop these competencies through a planned series of developmental experiences that span a significant portion of the time they are involved in their programs. The members felt that it was extremely important that efforts to develop these competencies not be reduced to a single course or, worse, to a lecture or discussion within a single course. They felt that in order to prepare students properly, the developmental approach was essential and that the approach should involve planned developmental experiences in local schools. It was their shared perception that teachers and administrators in many of the area schools would be highly interested in working with the College in a collaborative manner to accomplish the intent of this recommendation.

Recommendation 4: Enhance field experiences to provide students opportunities for involvement in site-based management activities.

Members of the Study Group perceived this recommendation as a logical extension of the third recommendation. In essence, it was their view that developmental field experiences could be designed in which students could become involved in various ways with teachers and administrators while they are engaged in actual site-based management activities. Moreover, their collective perception was that field experiences of this nature were indispensable elements of programs intending to prepare teachers and administrators to be successful in schools utilizing this collaborative approach to management. It was not the intent of the Study Group to recommend that a new course be designed to facilitate such field experiences. Rather, the intent was to recommend to the College faculty that existing field experiences at all levels of student development be reviewed for the purpose of modifying those experiences to incorporate plans for student involvement in site-based management as an integral part of each of those experiences and designing an articulated strand through the series of experiences. The emphasis the Study Group placed on the importance of developing these concepts, values, and skills through a planned series of developmental field experiences cannot be overstated.

Recommendation 5: Provide inservice on site-based management to teachers and administrators in the public schools; facilitate this activity by providing resources and incentives to College faculty.

The findings of this study clearly indicate that local schools and school systems are in need of information, guidance, and training related to site-based management in order to help them in the design and implementation of local improvement plans. Presently, they are reliant on books and other publications on the subject, private consultants, consultants from colleges and universities in other states, and visits to schools in other parts of the state and nation that have had success with this approach to management. Study Group members observed that the College of Education and Psychology at North Carolina State University should be providing leadership and technical assistance in this area to the public schools in the state. In addition to producing program graduates capable of operating successfully in more collaborative school environments, they thought that the College should be serving the public schools by designing and delivering effective inservice training to teachers and administrators in the field. An essential concurrent recommendation, however, is that the College must identify and provide new resources and incentives to interested College faculty members in order for this recommendation to be realistic. It is clear that additional services of this type cannot be made available to the public schools without additional resources and incentives to facilitate their delivery.

Recommendation 6: To improve the public schools, develop educational leaders committed to collaboration.

The Study Group included this recommendation to address the important role and responsibility of the College of Education and Psychology in the state's efforts to improve the public schools. School improvement, and the concomitant improvement of student performance, represent the fundamental impetus for implementing site-based management. It is important to note that site-based management does not directly affect students or their academic performance. Rather, it affects students indirectly through their teachers, administrators, and school environments. Effective site-based management directly affects the professional lives of school teachers and administrators. It can have a profound effect on their perceptions of their profession, their perceptions of themselves as professionals, and their professional self-esteem. In this study, it was clearly evident that in schools successfully implementing this new management paradigm, the perceptions of both teachers and administrators were changed in positive and unalterable ways. Teachers and other school leaders who acquire a genuine sense of empowerment and a belief that they can truly make a difference in the lives of students contribute enormously to the improvement of the public schools. By developing teachers and administrators who are true restructuring leaders committed to collaborative improvement for the benefit of students, the College of Education and Psychology at North Carolina State University can make a vital contribution to school improvement.

IMPROVING PRICING ACCURACY IN RETAIL STORES THROUGH MORE EFFECTIVE EMPLOYEE TRAINING

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Running Head: Pricing Accuracy

IMPROVING PRICING ACCURACY IN RETAIL STORES THROUGH MORE EFFECTIVE EMPLOYEE TRAINING

Abstract

Numerous media reports and surveys have accused retailers of failing to ensure that posted prices match the "scanned" prices that customers are actually charged. Academic, government, and industry studies, as well as media and news reports, have found pricing errors to varying degrees.

Careful analysis of pricing accuracy inspections indicate that retailers are probably not purposely skewing scanner prices to "rip off" customers. Poor pricing practices by retailers are the most often reported cause of these errors. Carelessness on the part of employees allow errors to slip into the system.

Pricing accuracy in retail stores can be improved by more effective training of employees. Store personnel must be made an integral part of maintaining correct prices and be provided thorough training to maintain the integrity of the store's pricing accuracy. All employees must understand that accurate prices impact customer satisfaction, future sales, and even their jobs.

Scanner technology revolutionized the retailing industry, and the way stores conduct business; but, these same scanners have some consumer advocates and media reporters fuming. Many of them view this technology as a means of simply "ripping off" customers.

Because of reported pricing inaccuracies, some states and cities are requiring "item pricing" on all merchandise. This solution still does not solve the problem and is probably an inefficient alternative for both customers and stores since it does not take advantage of the available technology. The implementation of scanning can cut labor costs for retailers and keep prices down for consumers. At the same time, scanners have the capability of offering customers more accurate pricing than having cashiers enter retail prices manually. However, the retail industry has never taken strong enough actions to ensure the promised pricing accuracy.

Above all, customers deserve correct prices. Their trust in the accuracy of the prices they are being charged is vital to the continued and future success of all retail stores.

Purpose of the Study

The purpose of this study was to collect information about the extent of pricing accuracy in retail stores that employ scanning, and to make recommendations about how to improve pricing accuracy. Specifically, the objectives of the study were as follows:

1) What level of retail pricing accuracy is being reported in this country by the media and researchers?
2) What level of retail pricing accuracy is being found by state weights and measures inspectors?
3) What level of retail pricing accuracy exists when a national model proposed by the National Institute of Standards and Technology is used for price inspections in retail stores?
4) What can be done to improve the level of pricing accuracy in retail stores?

Methods and Procedures

This research began with a review of background information related to the issue of pricing accuracy in retail stores. Findings from pricing accuracy surveys by media reporters from across the country were collected and analyzed.

States already conducting pricing accuracy inspections in retail stores were also identified. Extensive interviews were conducted with a representative of weights and measures in each of these states. Only four of them were conducting extensive and formalized pricing inspections on a wide variety of retail stores. These results were obtained and tabulated.

Next, researchers from the USC Center for Retailing conducted pricing accuracy inspections at retail stores in three southeastern states using the national model proposed by NIST (National Institute of Standards and Technology). The researchers also participated in store inspections with representatives of the North Carolina Division of Weights and Measures to ensure that tests would be conducted in a similar manner to those of state inspectors already using the national model.

Corporate executives of 32 nationally-known retail organizations were contacted seeking their participation in actual price inspections at a number of their stores. Seven retailers agreed to participate. Retailers participating in the study represented the following categories: department stores, discount department stores, drug stores, and specialty hardlines stores. Pricing accuracy inspections were conducted in twenty-one stores in three southeastern states--Georgia, North Carolina, and South Carolina. Retail prices of a total of 1,750 items were checked. All the data collected from the various sources were then analyzed and recommendations presented.

Background/Review of Literature

Numerous news stories and surveys have accused retailers of failing to ensure that posted prices match the "scanned" prices that customers are actually charged. Some reports even cite large numbers of pricing errors predominantly in the retailer's favor. Academic, government, and industry studies, as well as media stories and news reports, have found pricing errors to varying degrees.

Reports in much of the news media seem to make the retailer look guilty. The bottom line of recent news reports on ABC's *PrimeTime Live* (1993) and NBC's *Dateline* (1994) is the assertion that some retailers may be using scanners to intentionally cheat customers. Some have suggested that retailers may be engaging in high-tech robbery at the checkout--a charge the retail industry rejects. These reporters discovered that overcharges occurred more often than undercharges by a significant margin, and that overcharging is more likely to occur on sale items.

Some published reports even present estimates that consumers are losing billions of dollars annually from overcharges. **Money** magazine (O'Connell, 1993) has estimated annual losses to consumers of $1 billion due to scanner overcharges, and **InformationWeek**, a trade publication for computer system managers estimated these losses at $2.5 billion (Bartholomew, 1992).

These extrapolations may be based on erroneous estimates. For example, it would be misleading to conclude that a store with 10,000 items has overcharges on 1,000 items if that statement were based on a 10 percent error found in a sample of only 10 sale-priced items. Many pricing accuracy studies have been based on such small samples.

Stories in the media continue to point out the failure of some retailers to promptly correct pricing errors that are detected and reported by customers. One news broadcast reported that as many as ten purchasers had been overcharged on the same product without the price being corrected, even after the error was reported.

In a 1993 study by a UCLA professor (Goldstein, 1993) involving stores in southern California, an error rate of about 9 percent was found, with most of the mistakes favoring the stores rather than consumers. The study found that pricing errors occurred even near the end of sale periods, indicating poor price correction procedures or lack of price validation when price changes are made. Other studies have found error rates ranging from 2 percent to 15 percent depending on the store, the kind of merchandise, and whether the items were on sale or regularly-priced (Grimsley, 1994).

A retail inventory firm that conducts wall-to-wall price verification inspections (100 percent of the items in the store are verified) reported that only 1 of the 3,000 stores it inspected had an accuracy of 99 percent. Typically, store inaccuracies ranged from 8-12 percent on tests of 100 percent of the items (Davis, 1993).

Results are not much better when "item pricing" is used. One study found that pricing accuracy in areas that require item pricing range from 4-7%, similar to other studies in states using scanners (Price Verification Working Group, 1994).

Pricing accuracy inspections by some of the states conducting them are not quite as devastating as media reports. Inspections by Virginia Weights and Measures of 38,580 items at stores throughout the state found the prices on 4.84% of the items were incorrect. More undercharges (2.47%) occurred than did overcharges (2.37%). Inspections in Minnesota revealed similar results. The prices of 8,028 items were checked, and 3.79% were found to be incorrect. Again, undercharges were greater than overcharges--2.29% to 1.49%. Price inspections of

8,999 items in California found an error rate of 4.13%. Of this total, 2.51% were overcharges and 1.62% were undercharges.

These findings are based on the price inspection of stores, other than grocery stores, conducted by weights and measures inspectors in the respective states. In Michigan, the Attorney General's office is conducting pricing inspections of small numbers of sale items. Of 1,002 items checked recently, 127 had incorrect prices. For these sale items, overcharges (11.18%) were much higher than undercharges (1.50%).

Table 1

	VIRGINIA	MINNESOTA	CALIFORNIA
Items Checked	38,580	8,028	8,999
Total Errors	1,868 (4.84%)	304 (3.79%)	372 (4.13%)
Overcharges	914 (2.37%)	120 (1.49%)	226 (2.51%)
Undercharges	954 (2.47%)	184 (2.29%)	146 (1.62%)

Results of Pricing Inspections of Selected States (Non-Grocery Items)

A study conducted in April, 1993 by Philadelphia pricing inspectors examined 8,300 items; the prices of 100 products were checked in 83 different stores. The inspectors found 140 undercharges and 90 overcharges for an accuracy rate of 97.2% Garry, 1993).

The researcher and other personnel at the USC Center for Retailing conducted pricing accuracy inspections at twenty-one retail stores in three southeastern states using the national model proposed by NIST (National Institute of Standards and Technology). Stores representing seven nationally-known retailers were involved in these price inspections. Retail prices of a total of 1,750 items were checked. The overall error rate was 7.44%. The error rate showed a variance from a low of 0.0% (1 store) to a high of 14.0% (3 stores). Overall, overcharges were 4.06% versus 3.38% for undercharges. The error rate for sale/promoted items was significantly higher than that of regularly-priced items. Prices of 11.62% of the sale/promoted items inspected were in error while only 5.02% of the prices on regularly-priced items were in error (Overstreet and Clodfelter, 1995).

Discussion and Recommendations

Any publicity of price inaccuracies harms customer loyalty because successful retailers overwhelmingly depend upon repeat business. Customer loyalty is much too important for retail stores to risk alienating customers with the perception of poor pricing practices.

Even though an examination of most data refute the charge that retailers are intentionally overcharging customers, retailers must be concerned about all pricing inaccuracies--undercharges as well as overcharges. Undercharges reduce potential profit as well as causing customers to question the pricing integrity of all retail prices in the store. Overcharges also harm stores through the loss of consumer loyalty and negative publicity. Both types of pricing errors warrant attention and correction.

All this growing concern about pricing accuracy has put all retailers under increased scrutiny. Ken Butcher, a national weights and measures coordinator, has said that there is no evidence that retailers are purposely skewing the scanner prices. He blames the problem on "poor pricing practices" by retailers, careless computer record-keeping and inventory control that allow errors to slip into the system.

The scanner does not seem to be the source of the problem. It's human intervention. Errors in pricing are more often the result of mistakes and oversights made by store personnel, not intentional acts to defraud consumers. In fact, most of the problems are probably not with the technology, but with sloppy and negligent ways in which it is used or with poor coordination of activities on the sales floor of the store. For example, computers cannot determine if old sale signs have been removed or if the correct information was printed on existing shelf tags. However, many retailers with poor pricing accuracy have not had strong incentives to improve their pricing practices.

In January, a proposal to create standardized inspection procedures across the country moved closer to implementation. These procedures were developed by the National Institute of Standards and Technology through the NCWM (National Conference of Weights and Measures), a group composed of food and mass merchandise retailers, consumer advocacy groups, retail trade associations, and state and federal agencies. The proposed national procedures establishes a 98-percent accuracy standard for all retailers, and outlines carefully defined inspection procedures with specific sample sizes established. Both undercharges and overcharges are considered errors.

Initially, many stores are likely to fail a 98-percent pricing accuracy standard. State inspections in Virginia found that 86.37% of the stores inspected had error rates greater than 2%, while in California, 79.85% of the stores inspected did not meet the 98% accuracy standard.

Stores can meet and exceed the 98% percent accuracy requirement using available technology and good pricing practices if they take the right steps. But, they must realize that finding errors is only part of the process. Pricing discrepancies must be corrected and analyzed to determine how and why the errors occurred. Steps must then be taken to ensure that the same errors do not occur again. Most of those efforts need to involve more effective employee training.

Store personnel must be made an integral part of maintaining pricing accuracy. All employees must understand the importance of having accurate prices to customer satisfaction, future sales, and even eventually to their jobs. Cashiers must be thoroughly trained on how to handle customer complaints about inaccurate prices and how to follow-up on scanner errors.

The first step that a retailer should take is to determine if they are having problems with the store's price database.

Some price changes may have been overlooked by employees responsible for data input and not entered, while other price changes may have been entered incorrectly. Employees need to make sure that SKU numbers exactly match the UPC codes for which price changes are being made in the computer system.

Employees must be designated to conduct price verifications as a regularly-scheduled store activity, and the results must be used in performance reviews of employees responsible for pricing activities. How can these inspections be performed? Retailers could follow the procedures that will be used by state inspectors, but most will probably need to do more. Instead, retailers should go through a cycle of price inspections that verifies the entire store within a 13- to 26-week period. For example, each week during a 13 or 26 week cycle, the prices of all items in a designated department would be verified. Many stores already follow this practice. In addition, all items which have had a price change should be checked weekly. For most retailers, these audits will represent a significant incremental labor cost; however, it should be offset by fewer pricing errors no fines from state inspectors.

Scanning error report forms must be available and used by employees. Correcting an inaccurate price for only the one customer who has found an error does not improve the store's pricing integrity. The reason for the pricing error should be determined as soon as possible, and corrections made so that other customers will not be incorrectly charged.

Employees putting signs up too early or leaving them up too long also cause pricing errors for the customers. Price changes on the floor should be made during periods when the store is closed; otherwise, different prices are being charged from what are posted on the item or shelf. But, as many retailers move to 24-hour operations, there is no downtime to make these price changes. Before prices are increased in the computer, new price tags on the product or shelf need to be in place. In this instance, the customer is being charged the lower price between the paper and electronic price change. Likewise, if a price is being reduced, you should make the change in the price data file before affixing the new item/shelf price.

Designated employees should be assigned the task of cross-checking shelf prices against the in-store price file on the computer. They should also visually scan the aisles on a routine basis to ensure that shelf tags are in place for all items. Employees should also check the shelf tags to make sure that they are correctly positioned in reference to their products.

Sale items and limited-offer promotions are particularly prone to error. When items are given a reduced price for clearance, prices should be changed in the computer price file if possible. Clearance tags with the new sale price may fall off, or cashiers may simply not see the clearance tag and scan the item at its regular price. Also, employees should place clearance tags with the new sale price over the barcode making it impossible for the item to be scanned at the old price.

Performance reviews of store managers must be partially based on the store's pricing accuracy reports. Job descriptions for designated employees must also clearly detail their responsibility in maintaining pricing accuracy and the role it will play in their performance evaluations.

Above all, employees must implement a consistent pricing accuracy policy when errors do occur. For example, one retailer gives the customer the product free if it costs less than $3, or $3 off the price if it costs more. Pricing guarantees are being used at many stores to assure customers of pricing accuracy there and to instill consumer confidence.

The issue of retail pricing accuracy is not going to go away. But, with more effective employee training and more consistent operational procedures, the level of retail pricing accuracy should improve in the future.

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Cognitive Style of International and Domestic Graduate Students at Marshall University

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Running Head: Cognitive Style of Graduate Students at Marshall University

ABSTRACT

The cognitive style of a person refers to the distinctive method used to organize and retain information. As a classroom teacher, the knowledge of students' cognitive learning style can be a valuable tool in curriculum development. International students who are studying in the United States encounter difficulties as a result of their cognitive style. The research findings in this paper sought to describe the cognitive styles of both international and American graduate students.

The target population was graduate students in a variety of programs at Marshall University. The Group Embedded Figures Test (GEFT), along with a survey instrument, were used to obtain information essential to the study. Individual interviews with ten international students provided additional information pertinent to the study.

Research findings should assist teacher educators in providing instruction to all students. Results focused on the division between field independent/dependent orientations. There was no predictable relationship between student scores on the GEFT and student nationality, gender, or academic major. Several factors were discovered which might prove helpful in providing effective instruction for international students. University faculty should be aware of differences in students learning style, which can aid in the development of curriculum and evaluation methods.

COGNITIVE STYLE OF INTERNATIONAL AND DOMESTIC GRADUATE STUDENTS AT MARSHALL UNIVERSITY

Introduction

Cognitive Style is one dimension of a person's learning style. The cognitive style is the distinctive and preferred way a learner organizes and retains information (Keefe, 1979). This individual effort in learning modalities allows each learner to develop different learner characteristics. In essence, each learner has a learning finger print that is unique for that person. Becoming familiar with students' cognitive learning style can be a valuable tool for the classroom teacher. According to Herman A. Witkin's theory of cognitive style, people vary in the way they learn. Some are analytical in their approach to learning, while others are more global. Witkin's research focused on individual differences found in people's perceptual and intellectual functioning. Witkin found that people differ in their ability to dissemble figures from a field and to restructure and organize a field. Further research by Witkin and others found that these differences are consistent in other areas of personality, such as sense of self, locus of control, and defense mechanisms (Witkin, Ottman, Raskin & Karp, 1971). John Berry's research extended the theory of cognitive styles. Berry found ecological and cultural factors that may influence people's cognitive style (Berry, 1975).

STATEMENT OF THE PROBLEM

International students studying in the United States may experience stress by changes in language, diet, climate, attitudes, and culture. They may also encounter conflicts in their academic pursuits as a result of their cognitive styles. Any variability in learning style might be explained by other characteristics of the individual, such as gender, age, or academic major (Howard & Joder, 1987).

The research findings presented in this paper sought to describe the cognitive styles of both international and American graduate students. Four research questions were formulated to direct the study:

1. What is the relationship between nationality of a student and cognitive style?
2. What is the relationship between gender of a student and cognitive style?
3. What is the relationship between academic major of a student and cognitive style?
4. What factors of educational background might help identify problem areas an international student may encounter while studying at an American university?

METHODOLOGY

The design of this study was a descriptive/correlational study utilizing a triangulated approach. The target population was graduate students in a variety of programs at Marshall University (N = 100) (Table 1). Two instruments were used to obtain information essential to the study: 1) The Group Embedded Figures Test (GEFT), 2) all international students were given a survey instrument to assess teaching styles in their individual countries. Also, individual interviews were conducted with ten of the international students to provide further insight.

The GEFT has a tested reliability in the range of high .80's to low 90's (Goldstein & Blackman, 1980). Correlation of the GEFT with other tests of cognitive style has shown that the GEFT has concurrent validity in the field independent/dependent constructs (Witkin, Ottman, Raskin, & Karp, 1971). The interview tool was developed by the researcher and content validity was confirmed by a panel of experts familiar with interview techniques.

SIGNIFICANCE OF THE STUDY

The results of this study should assist teacher educators in providing instruction to all students. It will be especially useful to the instructor that has international students in their classes. The instructor will be able to adapt teaching techniques to accommodate all cognitive learning styles.

ASSUMPTIONS INVOLVED IN THIS STUDY

1. The investigator accepted the Allport position: that when given the opportunity to express one's self, the individual can and will respond in a valid reliable manner (Allport, 1953).
2. The investigator assumed that all students would be able to complete the GEFT Test.
3. It was also assumed that due to the fact that the data from this study would in no way affect the future of the subjects, they would not be threatened by the questionnaire and honest valid information would be received.

DATA ANALYSIS

Quantitative data gathered during the study was analyzed by the use of the Statistical Package for the Social Sciences. Qualitative data was analyzed using a thematic approach. Upon completion of the GEFT, individual scores were categorized by field dependent or field independent orientations. Possible scores on the GEFT ranged from 0 to 18. In this study, the division between field independent/dependent was set at a score of 12, as recommended by Witkin, Ottman, Raskin & Karp (1971). Students scoring 12 or above on the GEFT were classified as field independent. These students completed more easily the task of finding the "hidden" figures. Students scoring 11 or below were classified as field dependent. These students had more difficulty dissembling the "hidden" figures from the surrounding pattern. Since the data were collected from a sample chosen purposefully, no inferential statistics were considered appropriate.

The qualitative data collected required several techniques for analysis. The research questions on the instrument were analyzed using descriptive statistics. The data collected during the interviews was transcribed and grouped into themes for consideration.

FINDINGS

1. There was no predictable relationship between student scores on the GEFT and student nationality. The average score for American students was 10.4. The average score for international students was 12.3. The majority (70%) of American students were field independent. Students from China had similar orientations with 82% of the students classified as field independent. Students from Saudi Arabia had GEFT scores in the field dependent range. A correlation of the variable of nationality status and GEFT score resulted in $r=.18$; little, if any correlation. Much higher was the correlations of specific geographic area with GEFT score. The correlation results in a relationship of $r=.40$, which is still within the low range.
2. There was no predictive relationship between student scores on the GEFT and gender. This study revealed that females had a higher average GEFT score than males. The average female scores was 12.1 as compared to the average male scores of 10.0. Correlations revealed a negligible relationship of $r=.20$. International female graduate students were proportionally more field dependent than American female graduate students. American males tended to be more field independent (80.0%), while males from other countries tended to be field dependent.

3. There was no predictable relationship between student scores on the GEFT and academic major. Both American and international students majoring in Adult and Technical Education, or Mathematics and Business Administration tended to be field independent. Academic majors had a correlation of r=-.11 with the GEFT score. This correlation was classified as negligible and negative.

As a result of the qualitative analysis process, several factors were discovered which might prove helpful in providing effective instruction for international students.

4. a. Of the ten international students surveyed, all commented on the difference in classroom structure in their country and the United States. Most students were accustomed to a very strict lecture type environment.

   b. Six students spoke of the difference in teachers relying on textbooks. Apparently the textbook is the focus of material in Asian schools; whereas, in American schools many of the classes do not require a text, nor depend upon them for course content.

   c. Five students referred to a higher level of performance being expected of them in their country.

   d. Three students mentioned that they felt their teachers in the American school were more concerned about them and their learning, compared to teachers in their respective countries.

   e. Eight students referred to the increased number of projects and activities that were expected of them in the American schools.

f. Six students were troubled by the number of exams that had writing and performance components. They were accustomed to more rote memory type multiple choice exams.

g. All subjects expressed concern with the relaxed nature of the American classroom. They had adjusted and found it very helpful, but it was still out of their frame of reference.

Educational Importance

It is generally accepted and acknowledged that international students studying in the United States will experience some level of stress due to the changes in language, diet, climate, attitudes, and other cultural factors. This study finds that a substantial number of these international students also encounter difficulty due to their cognitive learning styles. This may be attributed to an innate learning preference, or it may be attributed to environmental factors. This study noted that striking differences were observed between American students and Chinese students.

University faculty, involved in instructional activities with international students should be aware that their line of reasoning may be less understood by some international students than others. They should also be aware that their presentation and evaluation methods may be very strange to international students. These problems are further exacerbated by changes in diet, climate, and culture.

Modifications should be made in presentation and evaluation techniques to allow for each student's learning style. International, as well as domestic students, should be provided with test taking techniques appropriate for each evaluation method to insure understanding and a true assessment of their subject matter knowledge. It is also very difficult for some international students to participate in class activities. Many students have never exhibited that type of behavior in their country. Instructors should recognize that Asian students come to study in American schools from a very strikingly different educational environment.

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LEADERSHIP IN RETAILING: IMPLICATIONS FOR MARKETING EDUCATION

by

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Running Head: Leadership in Retailing

LEADERSHIP IN RETAILING: IMPLICATIONS FOR MARKETING EDUCATION

ABSTRACT

The study of leadership is appropriate for marketing educators because they train the marketing professionals of tomorrow. These new professionals will have to solve the problems of producing more with fewer resources, and effective leadership is a key factor in motivating employees to be more productive. This research reports an exploratory project examining the perceptions of managers versus the perceptions of their sales associates concerning the managers' leadership styles. The project was conducted in two stores belonging to a ladies apparel specialty chain located in a large urban area.

LEADERSHIP IN RETAILING: IMPLICATIONS FOR MARKETING EDUCATION

Every day the consumer is presented with new opportunities to buy consumer goods in novel ways which are interesting and fun. Customer loyalty to traditional retailers seems threatened. The combination of exciting new ways to make purchases and the entrance of new retailers is putting tremendous competitive pressure on all retailers. Improving customer service is widely seen as a means of countering competition and a key to survival. The study of leadership is appropriate for marketing educators because tomorrow's retailers will have to understand and practice leadership to produce heightened employee productivity. In addition, the quality of customer service being sought can only be reached by empowered employees who are responding to well thought-out leadership. Marketing education has long been a forerunner in the development of leadership in students, however the inclusion of leadership in the marketing education curriculum now seems especially desirable. This paper reports a research study that is the first in a series planned to examine the relationship between style of leadership and effectiveness in retail management.

Changes In Today's Consumer and Retailing's Response: Review of Literature

Rapid changes occuring in the lifestyles of consumers has demanded equally rapid response from the industry which serves them by supplying their wants and needs. The retailing industry's response to its' changing market has been the acceleration of delivery of goods and services through technical innovation, and new types of outlets such as catalog retailers, television home shopping retailing, and, soon, interactive computer retailing. In addition, conventional, store-based retailers face a proliferation of non-traditional businesses that are selling products historically sold by conventional retailers. New businesses are also entering the market faster than ever before. The combination has produced tremendous competitive pressure on existing apparel retailers to retain customers who have had a change of mood regarding apparel purchases.

The Customers

A shift to thrift from an anything goes attitude toward spending describes the direction in family purchases for the 1990's. What happened to family income in a period when American retailing seemed to be at its most prosperous? According to Jack Kasulis (1991) personal real income begin to decrease in the late 1970's when American productivity and competitiveness begin to fall. This diminishment of purchasing power set the stage for the 1990's trends of off- price retailing and discounting, with the resulting price pressure on department store retailers and some speciality store retailers. Additionally, Katy Butler (1989) cites inflation that forced health care costs and real estate prices up in the face of decreasing real income. Many businesses begin to manifest signs of financial strain in the 1980's with many closing. Others merged in order to remain in business. Both strategies resulted in reduction in jobs which placed the additional burden of fear of unemployment on many individuals.

Butler and Kasulis agree about the adaptive changes families made. Family size grew smaller, women entered the work force to stay, and more consumers coped by spending beyond their means via highly available credit (Butler, 1989, Kasulis, 1991). The participation of women in the full-time work force altered the amount of time available for many activities formerly taken for granted, such as shopping. Pressure from lack of time and energy and the anxiety of not being able to meet expenses increased enormously on the individual and on families . According to Walter Loeb, not only is shopping now a chore for this time -pressed customer, but this person no longer shops impulsively. "The motto is, find it, buy it , and get out (Loeb, 1994, p.1)." Kasulis agrees, commenting that consumers will increasingly buy the components of their shopping list where they think they will receive the best value. ". . . more shoppers will buy suits at the a speciality store, shirts or blouses at the department store, neckwear at mass merchandisers, and socks or pantyhose at discount stores (Kasulis, 1991, p. 3)."

Five social trends described by Barbara Kaplan (Kaplan, 1993) help us understand the consumer of the 90's. Kaplan, a director at Yankelovich and Partners Inc., specializes in trends affecting retailing, fashion apparel, home furnishings, and food service. The MONITOR program, a twenty-three year old survey of social change, is the source of her data. These five trends are an erosion of trust, a "victim" ethic, stress and its effect on consumer decisions, the ascdendency of value, and the role of personal satisfaction in purchase behavior.

The Retailers

Retailers have been impacted negatively not only by changes in demographics and consumer interest but by changes in the forms of retailing. New forms of retailing have evolved in response to consumer changes, and technological advances have made these possible . (Peters, T., Mason, J.B. Mayer,M.L. and Wilkinson, J.B. , Feinburg, S., Katzen, L.R., Levy, W.K. are representative authors). According to Larry R. Katzen, retail square footage rose 58 percent in the 1980's, outgrowing both retail sales and population and producing an overstored condition in American retailing. Overstoring plus a recessionary economy plus a customer who does not particularly want to shop adds up to an extremely competitive climate for all retailers.

In the late sixties the department store was the destination for discerning shoppers

(Feinberg, 1989). Department stores were considered to be the fashion authority and the place to find the best brands of merchandise. They also dominated advertising, had the best trained management, and exerted considerable influence in the community (Levy, 1987). Today department stores struggle to maintain market share and keep customers (Feinberg, 1989, Levy, 1994).

The decline of the department store as the major fashion merchandiser has been attributed to slow response to rapidly changing demographics in age and age-related preferences and dependence on merchandising-based strategies instead of market-based strategies. Younger baby-boomers tended to buy into trends as a group. Now, as this group begins to dominate the market as older consumers, their preferences are no longer fashion-driven. In addition, the young "generation x" group, aged 16 to 30, are proving difficult to analyse. Traditional retailers have been slow to change their merchandise-driven position in which they acted as the means by which the suppliers reached the customer to a market-driven stance whereby they acted as the purchasing agent for the customer (Levy, 1987, Levy, 1994). Mass merchandisers and speciality retailers have been more nimble in responding to these changes in the consumer market. While the speciality retailer cannot be considered a new form, its superior ability to service customers in a particular niche has enabled it to claim customers once loyal to department stores. Providing service to customers rather than emphasizing the sale of merchandise seems to be the key to successful retailing in today's competitive climate.

Direct marketing is another form of retailing that is drawing customers away from conventional retailers. According to *Consumer Reports*, about 12 billion catalogs were sent last year, and over half of the adult population made at least one purchase by mail or by phone (Mail order shopping ,1994). *Ready-to-Wear Review* quotes David A. Cole in predicting that a major shift in shopping is occuring toward direct marketing of all types and suggests that in the near future access and convenience will be as important as price and quality in forming the consumer purchasing decision ("Future shop", 1994). According to the *Kiplinger Letter* , one out of ten purchases are now made through some method of direct marketing, with that number growing to one third of purchases in ten years. Kiplinger sees shopping in conventional stores remaining the dominant method of consumer purchasing, however strong competition will come from other avenues. Advances in voice recognition technology, virtual reality technology, and interactive television will make on-line shopping more practical and more popular, revolutionizing direct marketing (Kiplinger and Kiplinger, 1994).

Leadership

Improving the quality of customer service by establishing the customer's viewpoint as the focus of business policy is a favored strategy for improving business. However, if the customer is to be the driver for a company's service philosophy, leadership must be the fuel. Leonard L. Berry (1992) calls for increased attention to leadership in retailing maintaining that the best way for retailers to improve is for them to learn leadership.

Leadership appears in many guises, and different techniques are called leadership. The traditional style of leadership involves an exchange relationship, Hollander (1978) referred to this style as transactional. Transactional leadership is characterized by rewarding followers if they perform according to specifications set by the leader. John J. Hater and Bernard M. Bass (1988) call another style transformational, and define it as motivating others to perform beyond standard expectations. Transformational leadership is characterized by the transmission of a sense of mission, communication with followers, and individualized consideration of those followers. Transformational leadership may be more appropriate under the intensly competitive circumstances of today's marketplace because of its characteristic of motivating others to reach superior performance levels. Hater and Bass (1988) suggest that transformational leadership may be more effective with today's employees with their increased education level and higher personal fulfillment expectations. This in turn suggests that it would be the style most effective in producing improved business results.

In "Qualities of Leadership" Berry (1992) explains the qualities he has found common to successful retail leaders. Love of the business and a clear vison of what the business should be like are necessary, as well as the communication of the vision to others. Then retail leaders study change and innovation, constantly seeking new and better ways to implement the vision. These leaders maintain high standards of performance; they work very hard to execute the vison well. Personal integrity sets the example for followers and earns trust. Trust is a requirement for leaders. Berry (1992, p 3) cites Peter Drucker in a 1988 essay: " The final requirement of effective leadership is to earn trust. Otherwise these won't be any followers - and the only definition of a leader is someone who has followers". Berry's view of leadership is consistent with transformational leadership as described by Hater and Bass (1988).

James M. Kouzes and Barry J. Posner (1993) write in an introduction to the Leadership Practices Inventory that leadership is everyone's business, and that today's organizations need to utilize the talents of all employees. The Leadership Practices Inventory (LPI) authored by Kouzes and Posner measures traits that correspond to the transformational leadership model. The LPI was developed after intensive study of leaders. The authors found that most effective leadership could be summarized by five behaviors. These were (1) taking initiative, (2) being able to formulate and communicate a vision, (3) acting as an enabler to allow others to perform at their best, (4) acting as a model of the desired performance, and (5) encouraging, recognizing achievement, and supporting followers.

Methods

Leadership has been widely studied in highly varying fields. Kenneth E. Clark and Miriam B. Clark (Clark and Clark, 1990), offer a representative array of studies that range widely in the types of leaders studied. Retail management is one area of leadership that has not been extensively studied so an exploratory design was chosen to gain more information for the formation of study questions and propositions.

Information Sought In This Study

Insight into the following questions was sought.

1 What are the perceptions of sales associates of their immediate supervisors with regard to the supervisors' leadership practices?

2. What are the perceptions of department managers with regard to the store manager's leadership practices?

3. How sensitive is the *Leadership Practices Inventory* (LPI) in measuring perceptions of leadership in a retail setting?

Sample

Two stores in a regional apparel speciality chain were selected by the corporate mangement of the company being tested for this study. The general manager of one store was female, the other male. The female manager had been in her store approximately ten years, the male about two years. Both stores employed 4 area managers. Forty-four sales associates responded, 22 in the male manager's store and 27 in the female manager's. This was an educated and experienced sales force. Twenty people of the total sample of 44 had attended community college; of these five had graduated. Twelve of the total had attended four-year colleges and of these 2 had graduated. Eighteen of the total sample had over eight years experience selling. See Table I for the demographic description of the sales associates.

This sample was not randomized since causal inferences were not going to be made to the general population. Because this was an exploratory study, every effort was made to include all area managers and sales associates, and the two store managers were extremely cooperative in assisting with scheduling.

Instrument

The *Leadership Practices Inventory* (LPI) is a questionnaire that measures five behaviors describing transformational leadership styles. These five are described below (Kouzes and Posner, 1993b).

Challanging the Process . This means taking the initiative and accepting calculated risks. Taking ownership of the job at hand and pushing oneself to grow are personal characteristics that result in finding new ways to accomplish objectives. Challanging the process may be done by small actions and incremental improvements as well as actions that are bold or highly visible. The person who displays this to a high degree benefits an organization by helping it to stay competitive.

Inspiring a Shared Vision . Conventional wisdom holds that the effective organization knows where it is going. This trait involves ideals and standards, as well as an idea of the form of the results an organization should attain. In addition, an effective leader is able to communicate this to the followers.

Enabling Others to Act. Enabling others involves collaboration with followers by promoting cooperation and establishing common goals as well as sharing power and information.

TABLE 1

INFORMATION ABOUT THE RESPONDENTS TO THE LEADERSHIP PRACTICES INVENTORY-OBSERVER

	STORE 1		STORE 2	
GENDER (N=50)	MALE - 2	FEMALE - 23	MALE - 2	FEMALE- 23
AGE (N=48)				
18 to 25		7		3
26 to 35		1		7
36 to 45		7		4
46 to 55		5		4
56 to 65		3		4
66 or older		1		2
EDUCATIONAL LEVEL (N=50)				
Some High School		2		0
High School Graduate		8		6
Some Community College		7		8
Community College Graduate		1		4
Some 4-year College		6		4
4-Year College Graduate		0		2
Master's Degree		1		1
Doctor's Degree		0		0
TOTAL EXPERIENCE IN SALES (N=20)				
Less Than 1 Year		4		2
1 to 2 Years		4		1
3 to 4 Years		2		5
5 to 6 Years		0		4
7 to 8 Years		1		1
More Than 8 Years		9		9
EXPERIENCE IN THIS COMPANY (N=21)				
Less Than 1 Year		8		12

1 to 2 Years	2	2
3 to 4 Years	2	4
5 to 6 Years	0	2
7 to 8 Years	1	1
More Than 8 Years	8	2
EXPERIENCE IN THIS DEPT. (N=44)		
Less Than 1 Year	8	13
1 to 2 Years	3	3
3 to 4 Years	2	5
5 to 6 Years	0	1
7 to 8 Years	2	0
More Than 8 Years	6	1

This has the effect of enabling people to produce at their greatest potential, and can produce extraordinary results for the company.

Modeling the Way. An effective leader practices what he/she preaches. This person provides a visible example of the expected behavior. Consistency between words and actions are necessary for the leader's credibility.

Encouraging the Heart. Strengthening the purpose of participants is necessary to the successful outcome of a task, especially a difficult one. The effective leader accomplishes this by recognizing everyone's contribution to the common goal. Celebration of individual and team successes is an important technique for accomplishing this.

These five behaviors are measured by six questions each , and scored from 1 to 5 on a Likert type scale. The followers rate the leader and the leader rates him or herself . Both use a form of the same instrument, so that the same questions are answered by both leader and followers. The mean is found for the scores of the followers for the six questions for a behavior and this is compared to the leader's score for the same six questions.

In addition, a short questionnaire measuring demographic information was included.

Procedures

Data was collected from sales associates by administering the LPI and the demographic form in a meeting in the store one hour before they were scheduled to clock in . Respondents were paid from research funds for that hour. Every effort was made to insure confidentiality because the associates' perception of their immediate superior could be considered sensitive information. The fact that respondents were not on store time and were being paid by an entity other than the company were important factors in seperating the research from corporate interests. Area managers and the store managers completed the questionnaire at their convenience on the day the researcher was in the store. Means were then calculated for each of the five behaviors and compared to the managers' responses.

Findings and Discussion

Research Question 1

The first research question was "What are the perceptions of sales associates of their immediate supervisor with regard to the supervisor's leadership practices?" Comparison of the means of the sales associates' responses for all five behaviors with the self-ratings of the deapartment manager gave a very clear picture of the sales associates perceptions. See Table 2 for the sales associate's mean ratings and the department managers' self-ratings. Generally the managers' self-ratings were higher than their associates' means indicating that the associates felt that their manager's behaviors measured by the LPI were not as effective as the manager was perceiving those behaviors to be. In one case, the associates' means remained in the low sector of the profile while the manager's self-rating was in the high sector, meaning that this manager did not have an accurate perception of her own effectiveness. In one case, the associates' means were almost all higher than the manager's self-rating, which indicated that this manager was well perceived by her followers. Anecdotal evidence gained while the researcher was in the store reinforced these two points.

Research Question 2

The second research question was "What are the perceptions of the department managers regarding the leadership practices of the store manager?" The data for the store managers was treated like the data for the department managers. See Table 3 for the department managers'

TABLE 2

COMPARISON OF MEAN RATINGS OF SALES ASSOCIATES WITH SELF-RATINGS OF DEPARTMENT MANAGERS FOR EACH BEHAVIOR

(Max. Rating = 30)

	MEAN RATING OF SALES ASSOCIATES	DEPARTMENT MANAGER'S SELF-RATING
Manager 1 (N Associates=8)		
Taking Initiative	19.0	29.0
Communicating a Vision	17.3	28.0
Empowering Others	20.0	27.0
Modeling	20.4	29.0
Giving Credit	19.5	27.0
Manager 2 (N Associates=6)		
Taking Initiative	19.0	19.0
Communicating a Vision	15.0	23.0
Empowering Others	23.0	28.0
Modeling	23.0	23.0
Giving Credit	22.0	28.0
Manager 3 (N Associates=6)		
Taking Initiative	15.3	25.0
Communicating a Vision	14.0	24.0
Empowering Others	14.3	28.0
Modeling	17.2	27.0
Giving Credit	12.8	27.0
Manager 4 (N Associates=2)		
Taking Initiative	21.0	21.0
Communicating a Vision	21.0	17.0
Empowering Others	27.0	26.0
Modeling	25.0	23.0
Giving Credit	27.0	30.0

	MEAN RATING OF SALES ASSOCIATES	DEPARTMENT MANAGER'S SELF-RATING
Manager 5		
(N Associates=9)		
Taking Initiative	24.3	23.0
Communicating a Vision	24.7	19.0
Empowering Others	25.8	27.0
Modeling	25.0	24.0
Giving Credit	26.1	23.0
Manager 6		
(N Associates=7)		
Taking Initiative	23.7	26.0
Communicating a Vision	21.1	26.0
Empowering Others	25.9	30.0
Modeling	25.1	29.0
Giving Credit	27.3	30.0
Manager 7		
(N Associates=4)		
Taking Initiative	23.8	27.0
Communicating a Vision	20.8	24.0
Empowering Others	24.0	26.0
Modeling	23.5	29.0
Giving Credit	26.8	30.0
Manager 8		
Taking Initiative	23.6	22.0
Communicating a Vision	19.3	21.0
Empowering Others	22.7	26.0
Modeling	22.0	21.0
Giving Credit	21.7	23.0

TABLE 3

COMPARISON OF MEAN RATINGS OF DEPARTMENT MANAGERS WITH SELF-RATINGS OF STORE MANAGERS

(Max. Rating = 30)

	MEAN RATING OF DEPT. MANAGERS	STORE MANAGER'S SELF-RATING
Store Manager 1 (N Dept. Mgrs =4)		
Taking Initiative	28	28
Communicating a Vision	27	22
Empowering Others	29	25
Modeling the Way	29.8	26
Encouraging Followers	29	22
Store Manager 2 (N Dept. Mgrs=6)		
Taking Initiative	29.0	25
Communicating A Vision	29.7	29
Empowering Others	27.7	23
Modeling the Way	28.3	28
Encouraging Followers	29.2	24

mean ratings and the store managers' self-ratings. In both cases, the store managers rated their own leadership practices lower that the department managers' means. This indicates that the store managers were well liked by their subordinates. This is also perhaps an indication of more sophistication in leadership techniques due to greater maturity on the part of the store managers.

Research Question 3

The third research question was "How sensitive is the *Leadership Practices Inventory* (LPI) in measuring perceptions of leadership in a retail setting? " the researcher was satisfied that the LPI did measure the five leadership behaviors satisfactorily. However, the primary eveidence for this was anecdotal. The researcher was aware that the two stores in the sample were among the most profitable in the chain so the researcher wonders about the profile of store managers in less profitble stores.

SUMMARY

This study was a small, preliminary project to assess the appropriateness of the Leadership Practices Inventory in retail settings, and to gain some insight into the leadership process in stores. It produced data that illuminated the issue of the perception of employees concerning the leadership of their supervisors. It also indicated directions for future research. The next project planned is to compare results from the LPI with measures of employee productivity for the purpose of observing the effect of leadership, as measured by the LPI on the ability of employees to be more effective when they perceive leadership to be better. Future research should also focus on an appropriate measure of business productivity so that leadership may be measured in comparison to other productivity standards.

This study and the parent line of inquiry have strong implications for marketing education. One role of education is to prepare the managers and leaders of tomorrow. One important issue facing tomorrow's business leaders is going to be maximizing productivity in the face of increasing demand on resources. If leadership effectiveness is retailing can be better understood and then taught to marketing education students, they will have a competitive advantage with regard to the issue of producing more with less.

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Florida's School-to-Work Readiness Questionnaire: The Preliminary Data

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(This paper contains preliminary data from a statewide research project and is to be used for discussion purposes only and is not to be cited.)

Running head: THE PRELIMINARY DATA

Abstract

This paper represents the narrative of a critical issues presentation at the 1995 National Marketing Education Research Conference, and provides an overview of the *Florida School-to-Work Readiness Questionnaire* and a cursory analysis of the preliminary data collected during this projects early time frame pertaining to the three major component activities of this initiative. The activities discussed in this paper are the school-based, work-based, and connecting activities. To provide a comprehensive overview of Florida's readiness, statewide participation and focused questionnaire data gathering were coordinated between Florida's twenty-eight (28) School to Work planning regions and Florida International University (F.I.U.). These planning regions encompass Florida's sixty-seven (67) public school districts, twenty-eight (28) community colleges, as well as the Florida Department of Labor's twenty-five (25) service delivery areas. The overall participant response rate for this questionnaire was 97.9 percent. This paper examines the aggregation of the quantitative inputs for each of the forced response items on the questionnaire posed for each of the major school to work activities. Preliminary findings indicate that Florida has many well established school-based and connecting activities, but the data suggests additional focus and resources be made toward the development and implementation of the work-based activities as required by the School-to-Work Opportunities Act.

Florida's School-to-Work Readiness Questionnaire: The Preliminary Data

This paper represents the narrative of a critical issues presentation at the 1995 National Marketing Education Research Conference, which provides an overview of the *Florida School-to-Work Readiness Questionnaire,* the process, and a cursory analysis of the preliminary data collected during this projects early time. The data included within this paper are preliminary data and should be used for discussion purposes only and not be cited. This paper examines the preliminary quantitative data provided by the responding school districts and community colleges for the three major activities listed within the current School to Work legislation. These activities are the school-based, work-based, and connecting activities.

Purpose

The State of Florida is in competition with the remaining forty-two (42) states who have yet to receive federal funds to support activities under the School-To-Work Opportunities Act (STWOA) legislation. To support this effort, the Florida Department of Education awarded a research grant to Florida International University to develop, distribute, collect, and report the results of a statewide readiness questionnaire. The data collected from this project would be utilized in the development of a P*roposal for School-to-Work Implementation* to be submitted to the U.S. Government, and would also be utilized in the planning and implementation of the many statewide activities contained in and required by the STWOA.

Subjects

The developed questionnaire was mailed to each of the sixty-seven school districts, twenty-eight community colleges, and twenty-five service delivery areas, on February 15, 1995. The focal point for data collection was coordinated by the Tech Prep coordinators at each of the twenty-eight (28) School to Work planning regions, which also serve as Florida's Tech Prep consortia, who utilized the already established linkages between these major educational and labor entities that had been created and nurtured by the Tech Prep initiative. The twenty-five (25) Department of Labor's Service Delivery Areas (SDA) were provided a copy of this instrument to allow them time to begin gathering the necessary information regarding JTPA and other Department of Labor-sponsored programs. Enclosed with the questionnaire was a complete list of all recipients of the questionnaire including both Tech Prep and SDA personnel.

Response Rate

The return date for the completed questionnaire was April 1, 1995. The response rate was as follows:

66 of 67 School Districts:	98.5% Rate
27 of 28 Community Colleges:	96.4% Rate

Combined Overall Response Rate:

93 of 95 Participants: 97.9% Rate.

The overall response rate for this type of questionnaire considering the length (50 plus pages) and supporting evidence requirements is highly commendable.

Questionnaire Design

It is believed that Florida is the only State to conduct a Statewide School-to-Work Readiness Questionnaire as determined from a cursory review of the literature, and from telephone conversations with persons involved in School-to-Work activities at a state and national level. Therefore, the questionnaire was a "one-of-a-kind" model which incorporated traditional quantitative survey methodology as well as qualitative inputs used to verify the reported implementation levels of each activity or service to support School-to-Work activities. To date, the aggregation of the qualitative inputs is on-going, and are forecasted to be at least 5,000 pages in length, but are being organized by item number, respondent, level of implementation, and by written response, making this portion of the data readily and easily assessable to all that are interested.

To insure the content validity of the questionnaire a panel of experts was organized and comprised of persons from Oregon, Wisconsin, Oklahoma, Virginia, and Florida directly involved with School to Work activities. These persons included but were not limited to: a Statewide School-to-Work Director and Coordinator, Washington State School-to-Work Evaluator, Florida Tech Prep Coordinator, University Research Survey Design Expert, Florida Local Area Vocational Director, and Private Industry Counsel (PIC) Executive Director from a large urban district. The development of the questionnaire was truly a "team effort" and the quality of the product reflects each persons input and expertise.

Research Questions

The purpose of this questionnaire was to collect data and identify Florida's current status with respect to each of the required STWOA components in terms of the following:

- Level of implementation;
- Evidence or examples of implementation;
- Support required to maintain, enhance and/or improve programs, services or activities which have been implemented to some degree; and,
- Support, resources or additional assistance required to implement required components in areas where they do not currently exist.

It was not expected that every respondent will have or should have implemented all of the programs identified in the questionnaire. In designing this instrument, the intention was to create as comprehensive a list as possible to gain a statewide perspective on the level of implementation on all possible programs. To that end, if there were any programs that were not specifically identified in this instrument that the participant knew was implemented, they were asked to add and address them as appropriate. Each of participant was also asked to respond to each of the programs, services, and activities to support the School-to-Work grant proposal with concrete examples and comprehensive plans that provide measurable impact and accomplish desired outcomes for each item.

Levels of Implementation

The levels of implementation for each program, service, or activity to support School-to-Work included five possible levels: (1) Not Implemented: indicates that the program, service, or activity has not been addressed; (2) Planning: includes goal setting, staff orientation, the formation of committees and teams, and the development of plans for a program, service or activity; (3) Development: involves activities as reviewing, designing, creating, and field testing a program, service, or activity; (4) Initial Implementation: occurs when plans and activities of the development stage begin to be initially carried out for a program, service, or activity; and, (5) Fully Implemented: occurs when a program, service, or activity is routinely carried out, regularly reviewed and evaluated, and institutionalized so that it continues regardless of changes in leadership. The primary focus of the implementation levels was to determine from the participant inputs - what services, programs, or activities were initial/fully implemented or in a planned/development stage. The respondents to the questionnaire were asked to provide qualitative evidence on what was needed to maintain implemented activities at their current levels, as well as what are the requirements for those activities in the planning and development stages to bring them to full implementation.

Technical Support

Each Tech Prep Coordinator was contacted personally by telephone by one of the F.I.U. staff members involved in this research effort. A log was kept to record the name of person contacted, time and date of the conversation was recorded. A personal overview and orientation of the questionnaire's contents, both sections (quantitative and qualitative), glossary of terms, levels of implementation was provided, and any questions concerning the instrument were addressed. Technical support was available eight hours-per-day, five-days per-week during the response time frame for this instrument.

Preliminary Data Analysis

The following is a cursory review of the preliminary data for the three major components for school-to-work activities, the school-based, work-based, and connecting components. The data are aggregated by both the school-districts and by the community colleges inputs for each of the three components. Please refer to the attached tables which are provided for each of the discussion topics. The numbers of schools and students listed by the activity are an estimate provided by the questionnaire respondents.

School-Based Components - School District Data

The school-based activities which were reported as having the highest levels of implementation (please refer to Table 1) within the school districts (combined 70% or higher combined fully implemented (fi) plus initial implementation (ii)) were those that have been in existence for a number of years such as: the Florida Gold Seal Endorsement/ Scholarship program which was reported as 94% implemented (91% fi and 3% ii rates) -- with a reported 302 schools and 84,766 students participating in this activity statewide; Career Awareness/Exploration activities were noted as 88% implemented (72% fi and 16% ii); Vocational Student Organizations 88% implemented (85% fi and 3 ii); Blueprint for Career Preparation activity (54% fi and 31% ii) - 610 schools and 444,663 students; Student Leadership Organizations was next reported as 77% implemented (73% fi and 4% ii); Career Resource Centers were 76% implemented (55% fi and 21% ii); and Tech Prep was reported as 72% implemented (45% fi and 27% ii) and is a relatively new activity in Florida beginning with funding of eleven pilot consortia in 1991. The next activity Simulations had a reported 58% implementation rate, which represents a considerable gap between the seventh and eighth school-based activity.

It is interesting to note the levels of participation with the listed school based

TABLE 1

FLORIDA SCHOOL-TO-WORK READINESS
School District Data

SCHOOL-BASED COMPONENTS

SORTED BY: Implementation Rate

Item #	Initiatives	Full Implementation Rate (5)	Initial Implementation Rate (4)	Development Rate (3)	Planning Rate (2)	Not Implementing Rate (1)	Participation Rate (2,3,4 &5)	Implementation Stages (4&5)	Planning/Development Stages (2&3)	Number of Students	Number of Schools
14	Gold Seal Endorsement/ Scholarship	91%	3%	1%	1%	0%	97%	94%	3%	84,776	302
5	Career Awareness/ Exploration	72%	16%	9%	1%	0%	99%	88%	10%	573,403	717
12	Vocational Student Organizations	85%	3%	4%	0%	1%	93%	88%	4%	73,423	376
17	Blueprint for Career Preparation	54%	31%	3%	7%	1%	96%	85%	10%	444,663	610
11	Student Leadership Organizations	73%	4%	4%	0%	13%	82%	78%	4%	146,877	328
7	Career Resource Center	55%	21%	9%	6%	6%	91%	76%	15%	358,947	507
15	Tech Prep	45%	27%	13%	10%	1%	96%	72%	24%	51,122	257
4	Simulations	36%	22%	4%	1%	33%	64%	58%	6%	120,861	244
3	Career Clusters	34%	16%	9%	15%	19%	75%	51%	24%	209,401	277
13	Vocational Gender Equity	40%	3%	10%	3%	39%	57%	43%	13%	49,256	177
1	Career Academies	22%	19%	3%	16%	37%	61%	42%	19%	23,097	102
6	School-site Mentors	27%	12%	4%	7%	46%	51%	39%	12%	58,044	303
8	School-based Enterprises	15%	18%	1%	6%	55%	40%	33%	7%	10,267	151
2	Schools within Schools	15%	13%	6%	7%	54%	42%	28%	13%	12,396	64
9	Centers of Emphasis	24%	4%	0%	6%	60%	34%	28%	6%	3,525	34
18	Performance-based Incentive Funding	7%	13%	7%	3%	60%	31%	21%	10%	160,310	74
10	High Schools That Work	7%	13%	0%	3%	69%	24%	21%	3%	34,454	30
16	Florida Compact	19%	1%	0%	1%	67%	22%	21%	1%	2,962	49

activities. The level of participation takes into consideration both implementation (fi and ii) levels and includes planning (p) and development (d) activities to equal a total participation rate (tpr). Those activities reported with a 90% and above total participation rate (fi+ii+d+p=tpr) include: The Career Awareness/Exploration activity - 99% tpr; Florida Goal Seal Endorsement/ Scholarship programs - 97% tpr; Blueprint for Career Preparation and Tech Prep both shared a 96% tpr; Vocational Student Organizations with a 93% tpr; with Career Resource Centers with 91% tpr as the remaining activity in the 90% tpr range. The next tpr activity is nine points down - Student Leadership Organizations.

The school-based activities which were reported to be less than 50% implemented within the school districts are respectively: Vocational Gender Equity (43% implemented - 40% fi and 3% ii); Career Academies (41% implemented - 22% fi and 19% ii); School-site Mentors (39% implemented - 27% fi and 12% ii); School-based Enterprises (33% implemented - 15% fi and 18% ii); Schools within Schools (28% implemented - 15% fi and 13% ii); Centers of Emphasis (28% implemented - 24% fi and 4% ii); Performance-based Incentive Funding (20% implemented - 7% fi and 13% ii); High Schools That Work (20% implemented - 7% fi and 13% ii); and, Florida Compact (20% implemented - 19% fi and 1% ii).

School-Based Components - Community College Data

It is interesting to note the most established school-based activity (please refer to Table 2) within the community colleges was Tech Prep, which has only been in existence since the initial funding process began in 1991. Tech Prep was reported as 72% implemented (43% fi and 29% ii) statewide - 28 colleges campuses and 2,389 students. The other school-based activities within the community colleges having a 50% or greater combined implementation level (fi+ii) included: Vocational Gender Equity Programs was reported to be 64% implemented (57% fi and 7% ii); Vocational Student Organizations were noted as 61% implemented (54% fi and 7% ii) as well as Student Leadership Organizations (54% fi and 7% ii); Career Resource Centers - 57% implemented (43% fi and 14% ii); next at 54% implementation was Performance-based Incentive Funding (14% fi and 36% ii); reported at 53% implemented were both Simulations - (32% fi and 21% ii) and Centers of Emphasis - (39% fi and 14% ii); and, last reported in the 50% implementation range were the Career Awareness/Exploration activities (43% fi and 7% ii).

Several of the questionnaire listed school-based activities were primarily designed for secondary schools and not community colleges. Therefore it is not surprising to find that many of these initiatives were reported to be less than 50% implemented at the community colleges. These initiatives are respectively: Career Clusters (29% implemented - 25% fi and 4% ii); Gold Seal Endorsement/Scholarship (25% implemented - 21% fi and 4% ii); School-site Mentors (18% implemented - 14% fi and 4% ii); School-based Enterprises (11% implemented - 11% fi and 0% ii);

TABLE 2

FLORIDA SCHOOL-TO-WORK READINESS

Community Colleges Data

SCHOOL-BASED COMPONENTS

SORTED BY: Implementation Rate

Item #	Initiatives	Full Implementation Rate (5)	Initial Implementation Rate (4)	Development Rate (3)	Planning Rate (2)	Not Implementing Rate (1)	Participation Rate (2,3,4 &5)	Implementation Stages (4&5)	Planning/Development Stages (2&3)	Number of Students	Number of Schools
15	Tech Prep	43%	29%	14%	7%	0%	93%	71%	21%	2,386	29
13	Vocational Gender Equity Programs	57%	7%	0%	4%	21%	68%	64%	4%	3,050	18
12	Vocational Student Organizations	54%	7%	4%	4%	18%	68%	61%	7%	4,298	29
11	Student Leadership Organizations	54%	7%	4%	0%	21%	64%	61%	4%	5,626	33
7	Career Resource Center	43%	14%	4%	4%	25%	64%	57%	7%	110,274	37
18	Performance-based Incentive Funding	18%	36%	4%	14%	21%	71%	54%	18%	24,148	18
4	Simulations	32%	21%	4%	4%	21%	61%	54%	7%	15,455	26
9	Centers of Emphasis	39%	14%	0%	0%	32%	54%	54%	0%	3,415	11
5	Career Awareness/ Exploration	43%	7%	4%	7%	18%	61%	50%	11%	54,931	21
3	Career Clusters	25%	4%	0%	0%	50%	29%	29%	0%	29,202	4
14	Gold Seal Endorsement/ Scholarship	21%	4%	0%	0%	50%	25%	25%	0%	298	5
6	School-site Mentors	14%	4%	7%	7%	50%	32%	18%	14%	1,695	21
8	School-based Enterprises	11%	0%	0%	0%	68%	11%	11%	0%	670	3
17	Blueprint for Career Preparation	4%	4%	11%	0%	61%	18%	7%	11%	310	4
1	Career Academies	4%	0%	0%	7%	64%	11%	4%	7%	0	0
2	Schools within Schools	4%	0%	0%	4%	71%	7%	4%	4%	500	2
10	High Schools That Work	4%	0%	0%	0%	75%	4%	4%	0%	0	1
16	Florida Compact	4%	0%	0%	0%	75%	4%	4%	0%	0	0

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Blueprint for Career Preparation (8% implemented - 4% fi and 4% ii); Schools within Schools (4% implemented - 4% fi and 0% ii); Career Academies (4% implemented - 4% fi and 0% ii); High Schools That Work (4% implemented - 4% fi and 0% ii); and, Florida Compact (4% implemented - 4% fi and 0% ii).

Work-Based Components - School District Data

The work-based component data (please refer to Table 3) within the school district's revealed that none of the activities listed were greater than 89% implemented (fi+ii). The most established work-based activity within the school districts was reported to be Diversified Cooperative Training as 88% implemented (82% fi and 6% ii) -242 schools and 14,018 students. The next activity was approximately eleven percentage points down - Employer Participation in Vocational Fairs 77% implemented (70% fi and 7% ii). Of the work-based activities listed, only 36 percent (13 of 36 activities) were reported at a 50% or greater implementation rate. However when examining the reported total participation rate (tpr) of these activities it is noted that there is movement within the school-district's to address this component area with 52.7% of the activities (19 of 36) indicating a 51% tpr or greater.

It should be noted that each of the formal apprenticeship activities listed within this component area were reported as low involvement in both implementation and statewide participation percentages within the participating school districts.

TABLE 3

FLORIDA SCHOOL-TO-WORK READINESS
School District Data

WORK-BASED COMPONENTS

SORTED BY: Implementation Rate

Item #	Initiatives	Full Implementation Rate (5)	Initial Implementation Rate (4)	Development Rate (3)	Planning Rate (2)	Not Implementing Rate (1)	Participation Rate (2,3,4 &5)	Implementation Stages (4&5)	Planning/Development Stages (2&3)	Number of Students	Number of Schools
46	Diversified Cooperative Training	82%	6%	4%	1%	9%	94%	88%	6%	14,018	242
53	Employers Participate in Vocational Fairs	70%	7%	3%	1%	13%	82%	78%	4%	169,748	364
54	Businesses Provide Material/Equipment	64%	12%	9%	0%	10%	85%	76%	9%	278,090	556
42	Cooperative Education	70%	4%	3%	3%	13%	81%	75%	6%	23,487	326
52	Employers Participate in Academic Fairs	61%	12%	4%	1%	16%	79%	73%	6%	256,156	525
35	JTPA IIB - Summer Youth Programs	64%	7%	0%	4%	18%	76%	72%	4%	22,724	275
28	Job Shadowing	52%	18%	4%	7%	15%	82%	70%	12%	8,833	248
21	Paid Work Experience	64%	6%	3%	0%	22%	73%	70%	3%	20,820	235
49	Clinical or Field Experience	48%	15%	0%	3%	27%	66%	63%	3%	87,133	146
36	JTPA IIC - Year Round Youth Programs	52%	4%	4%	1%	31%	63%	57%	6%	9,741	112
51	Mini-grants for Innovative Projects	45%	10%	4%	3%	33%	63%	55%	7%	64,828	291
20	Workplace Education	39%	15%	4%	1%	36%	60%	54%	6%	26,556	166
45	OJT - Other	45%	9%	0%	4%	36%	58%	54%	4%	7,634	185
34	JTPA 123 Post-secondary Programs	45%	4%	3%	0%	42%	52%	49%	3%	8,228	47
30	Project Independence	40%	9%	3%	4%	39%	57%	49%	7%	8,349	61
22	Supported Employment	43%	6%	1%	4%	42%	55%	49%	6%	895	81
33	JTPA IIA - Adult Low Income Programs	46%	3%	1%	0%	40%	51%	49%	1%	12,229	42
48	Partners in Excellence/ Adopt-a-School	40%	6%	4%	4%	39%	55%	46%	9%	619,555	816
38	JTPA III - Dislocated Worker Programs	42%	4%	1%	0%	45%	48%	46%	1%	9,658	45
19	Workplace Mentoring	27%	15%	6%	10%	37%	58%	42%	16%	4,041	106
43	OJT - JTPA	34%	3%	1%	0%	51%	39%	37%	1%	4,005	100
37	Local PIC Dropout Prevention Programs	27%	9%	6%	0%	51%	42%	36%	6%	6,766	102
41	Blueprint for School-to-Community Transition	21%	10%	6%	7%	48%	45%	31%	13%	10,062	96
47	Service Learning	16%	12%	9%	6%	48%	43%	28%	15%	5,592	85
29	Executive Internships	21%	7%	1%	6%	58%	36%	28%	7%	2,076	92
25	Florida Registered Apprenticeships	22%	6%	0%	1%	66%	30%	28%	1%	4,559	42
40	Migrant/ Farmworker Programs	24%	3%	1%	0%	63%	28%	27%	1%	11,237	202
26	Adult Apprenticeships	21%	4%	0%	1%	69%	27%	25%	1%	1,859	39
50	Employer Tutoring	21%	3%	3%	10%	57%	37%	24%	13%	11,184	117
24	Youth Apprenticeships	3%	10%	4%	16%	61%	34%	13%	21%	3,126	67
27	LEE Programs	7%	4%	1%	1%	82%	15%	12%	3%	528	14
31	Cities in Schools	7%	3%	0%	1%	82%	12%	10%	1%	6,415	81
23	Pre-Apprenticeships	6%	3%	3%	6%	79%	18%	9%	9%	119	24
44	OJT - Federal Programs (TJTC)	9%	0%	0%	3%	78%	12%	9%	3%	133	13
32	Youth Conservation Corps	4%	1%	1%	0%	87%	7%	6%	1%	122	5
39	Native American JTPA Programs	0%	1%	0%	0%	88%	1%	1%	0%	51	7

Work-Based Components - Community College Data

The work-based component data within the community college's (please refer to Table 4) revealed that none of the activities listed were greater than 86% implemented (fi+ii). The most established work-based activity within the community colleges was reported to be Businesses Provide Materials/Equipment as 85% implemented (64% fi and 21% ii). The next activity was JTPA III: Dislocated Worker Programs - 83% implemented (79% fi and 4% ii). Of the work-based activities listed only 28 percent (10 of 36 activities) were reported at a 50% or greater implementation rate. However when examining the reported total participation rate (tpr) of these activities it is noted that there is little movement within the community colleges to address the remaining component areas with 28% of the activities (10 of 36) indicating a 50% tpr or greater.

It should also be noted that each of the formal apprenticeship activities listed within this component area were reported as low involvement in both implementation and statewide participation percentages within the community college system. This data mirror the data reported by the school districts for apprenticeship activities.

Connecting Activities - School District Data

Twelve of thirteen activities listed under the Connecting component (please refer to Table 5) were reported at an implementation rate of 54% or greater (fi+ii). Student Guidance in Scholarships/Aid was reported as 94% implemented - 85% fi

TABLE 4

FLORIDA SCHOOL-TO-WORK READINESS

Community Colleges Data

WORK-BASED COMPONENTS

SORTED BY: Implementation Rate

Item #	Initiatives	Full Implementation Rate (5)	Initial Implementation Rate (4)	Development Rate (3)	Planning Rate (2)	Not Implementing Rate (1)	Participation Rate (2,3,4 &5)	Implementation Stages (4&5)	Planning/Development Stages (2&3)	Number of Students	Number of Schools
54	Businesses Provide Material/Equipme	64%	21%	4%	0%	7%	89%	86%	4%	24,075	41
38	JTPA III - Dislocated Worker Programs	79%	4%	0%	0%	7%	82%	82%	0%	3,079	19
49	Clinical or Field Experience	75%	4%	0%	0%	11%	79%	79%	0%	16,890	22
33	JTPA IIA - Adult Low Income Program	71%	4%	0%	0%	18%	75%	75%	0%	2,697	19
34	JTPA 123 Post-secondary Programs	64%	4%	4%	0%	18%	71%	68%	4%	3,642	20
42	Cooperative Education	61%	7%	0%	0%	25%	68%	68%	0%	2,344	19
30	Project Independence	57%	7%	0%	4%	18%	68%	64%	4%	3,577	19
53	Employers Participate in Vocational Fa	54%	4%	0%	4%	25%	61%	57%	4%	8,578	23
20	Workplace Education	46%	4%	0%	0%	32%	50%	50%	0%	19,071	20
36	JTPA IIC - Year Round Youth Program	46%	4%	0%	0%	36%	50%	50%	0%	1,901	12
35	JTPA IIB - Summer Youth Programs	46%	0%	0%	0%	32%	46%	46%	0%	3,156	14
52	Employers Participate in Academic Fai	32%	7%	0%	0%	43%	39%	39%	0%	5,510	19
21	Paid Work Experience	29%	11%	4%	0%	43%	43%	39%	4%	929	13
19	Workplace Mentoring	32%	4%	0%	7%	39%	43%	36%	7%	2,438	16
25	Florida Registered Apprenticeships	32%	0%	0%	0%	50%	32%	32%	0%	897	9
51	Mini-grants for Innovative Projects	25%	7%	7%	4%	36%	43%	32%	11%	3,180	10
47	Service Learning	14%	14%	0%	0%	54%	29%	29%	0%	2,260	15
26	Adult Apprenticeships	18%	4%	0%	4%	57%	25%	21%	4%	1,603	6
45	OJT - Other	18%	4%	0%	0%	57%	21%	21%	0%	371	3
28	Job Shadowing	14%	4%	7%	4%	46%	29%	18%	11%	1,381	19
29	Executive Internships	14%	4%	0%	0%	61%	18%	18%	0%	52	4
48	Partners in Excellence/ Adopt-a-Schoo	7%	11%	0%	0%	64%	18%	18%	0%	500	0
50	Employer Tutoring	11%	4%	4%	0%	61%	18%	14%	4%	185	3
40	Migrant/ Farmworker Programs	11%	4%	0%	0%	68%	14%	14%	0%	604	5
43	OJT - JTPA	11%	4%	0%	0%	64%	14%	14%	0%	72	5
37	Local PIC Dropout Prevention Progra	11%	0%	0%	4%	64%	14%	11%	4%	241	5
22	Supported Employment	7%	0%	4%	0%	64%	11%	7%	4%	67	4
23	Pre-Apprenticeships	7%	0%	0%	4%	68%	11%	7%	4%	153	4
24	Youth Apprenticeships	4%	4%	0%	0%	75%	7%	7%	0%	270	1
44	OJT - Federal Programs (TJTC)	7%	0%	0%	0%	71%	7%	7%	0%	109	3
41	Blueprint for School-to-Community Tra	0%	4%	4%	0%	64%	7%	4%	4%	225	101
27	LEE Programs	4%	0%	0%	0%	75%	4%	4%	0%	400	1
46	Diversified Cooperative Training	4%	0%	0%	0%	75%	4%	4%	0%	375	1
32	Youth Conservation Corps	0%	0%	0%	4%	79%	4%	0%	4%	20	1
39	Native American JTPA Programs	0%	0%	0%	4%	79%	4%	0%	4%	245	2
31	Cities in Schools	0%	0%	0%	0%	82%	0%	0%	0%	0	0

TABLE 5

FLORIDA SCHOOL-TO-WORK READINESS
School District Data

CONNECTING ACTIVITIES and SERVICES

SORTED BY: Implementation Rate									
Item #	Initiatives	Full Implementation Rate (5)	Initial Implementation Rate (4)	Development Rate (3)	Planning Rate (2)	Not Implementing Rate (1)	Participation Rate (2,3,4 &5)	Implementation Stages (4&5)	Planning/Development Stages (2&3)
62	Student Guidance in Scholarships/Aid	85%	9%	1%	1%	1%	97%	94%	3%
64	Student Guidance in Career Counseling	76%	16%	6%	0%	0%	99%	93%	6%
61	Student Guidance in Continuing Ed Options	69%	12%	6%	1%	7%	88%	81%	7%
65	Student Guidance in Personal Counseling	61%	15%	6%	3%	9%	85%	76%	9%
59	Student Guidance in Job Placement	60%	16%	3%	1%	15%	81%	76%	4%
63	Student Guidance in Linkages to Community	46%	25%	9%	6%	12%	87%	72%	15%
55	Assess & Match Students w/Work-based Learning Op	46%	22%	6%	9%	13%	84%	69%	15%
66	Collect/Analyze Program Outcomes	52%	15%	6%	7%	16%	81%	67%	13%
60	Student Guidance in Job Coaching	46%	16%	4%	4%	22%	72%	63%	9%
58	ETA in Providing Staff Development	34%	19%	9%	18%	18%	81%	54%	27%
56	ETA in Design of School- & Work-based Components	33%	21%	6%	18%	19%	78%	54%	24%
57	ETA in Implement School- & Work-based Components	33%	21%	6%	18%	19%	78%	54%	24%
67	Link Youth Activities w/Upgrading Worker Skills	25%	12%	13%	10%	34%	61%	37%	24%

and 9% ii. The top six activities for this component area were student guidance activities related respectively to: scholarships/aid; career counseling; continuing education options; personal counseling; job placement; and student linkages to the community.

Within the school districts 100% of the connecting activities were reported to have a participation rate of 61% or greater (range: 61 to 97%). It should also be noted that those activities rated with lower implementation involved employers, employer technical assistance activities, and linking youth activities with upgrading worker skills.

Connecting Activities - Community College Data

A majority of the connecting activities (please refer to Table 6) were reported as being in the implementation stage by the community colleges. Of the 13 activities listed, 77% were reported as 54% or greater implemented (fi+ii). Combined implementation rates reveal that Student Guidance in Career Counseling was the most implemented component - 93% implemented (75% fi and 18% ii). The top five activities for the community colleges connecting components were student guidance activities related respectively to: career counseling; scholarships/aid; continuing education options; job placement; and, personal counseling.

Within the community colleges 92% of the connecting activities (12 of 13) were reported to have a participation rate of 50% or greater (range: 50 to 96%). It

TABLE 6

FLORIDA SCHOOL-TO-WORK READINESS

Community Colleges Data

CONNECTING ACTIVITIES and SERVICES

SORTED BY: Implementation Rate

Item #	Initiatives	Full Implementation Rate (5)	Initial Implementation Rate (4)	Development Rate (3)	Planning Rate (2)	Not Implementing Rate (1)	Participation Rate (2,3,4 &5)	Implementation Stages (4&5)	Planning/Development Stages (2&3)
64	Student Guidance in Career Counseling	75%	18%	4%	0%	0%	96%	93%	4%
62	Student Guidance in Scholarships/Aid	89%	0%	4%	0%	0%	93%	89%	4%
61	Student Guidance in Continuing Ed Options	82%	7%	0%	0%	7%	89%	89%	0%
59	Student Guidance in Job Placement	54%	25%	0%	0%	14%	79%	79%	0%
65	Student Guidance in Personal Counseling	61%	11%	4%	0%	18%	75%	71%	4%
66	Collect/Analyze Program Outcomes	46%	21%	4%	4%	21%	75%	68%	7%
56	ETA in Design of School- & Work-based Components	57%	7%	7%	7%	14%	79%	64%	14%
58	ETA in Providing Staff Development	50%	11%	7%	4%	21%	71%	61%	11%
55	Assess & Match Students w/Work-based Learning Op	39%	14%	7%	11%	21%	71%	54%	18%
63	Student Guidance in Linkages to Community	46%	7%	4%	7%	29%	64%	54%	11%
57	ETA in Implement School- & Work-based Components	36%	11%	11%	7%	29%	64%	46%	18%
60	Student Guidance in Job Coaching	29%	11%	4%	7%	43%	50%	39%	11%
67	Link Youth Activities w/Upgrading Worker Skills	14%	4%	4%	0%	71%	21%	18%	4%

should also be noted that those activities rated with lower implementation involved employers, employer technical assistance activities, and linking youth activities with upgrading worker skills.

Preliminary Findings/Recommendations

Many of the school-based and connecting activities to support the STWOA are reported to be well established when examining the aggregated data to provide a statewide perspective. As to be expected, the school districts are embracing and implementing more school-based initiatives within their schools, because of their design and intended target audiences. The community colleges are aggressively implementing Tech Prep as their primary school-based activity which will serve many students, including those who are articulating directly articulating from secondary Tech Prep and those persons returning to community college for advance skills development. The connecting activities particularly those involving student guidance for both career counseling and scholarships/aid are the top two activities of the school districts and community colleges reporting. This data may suggest that Florida's students both secondary and postsecondary are being made aware of career options and funding opportunities available to the students to reach their career goals.

The work-based activities were reported to have the lowest overall implementation rates of the three major School-to-Work components, particularly in the establishment of apprenticeship activities at both the school districts and community colleges. The preliminary data suggest additional focus and resources would be necessary if the development and implementation of the questionnaire's listed work-based activities are deemed necessary to support the requirements of the School-to-Work Opportunities Act.

The following has provided an overview of the *Florida School-to-Work Readiness Questionnaire*, the process, and a cursory analysis of the preliminary data collected during this project's short time frame. The data collected from this project's research effort will be utilized in the planning, development, and implementation of an on-going Florida Statewide School-to-Work initiative.

The Program for Applied Academics Technical Studies

Mary J. Thompson
Volusia-Flagler Tech Prep

PROGRAM FOR APPLIED ACADEMICS AND TECHNICAL STUDIES

PROCEDURES

MANUAL

THE PROGRAM FOR APPLIED ACADEMICS & TECHNICAL STUDIES

PROCEDURES MANUAL

INTRODUCTION

This manual has been developed to capture and describe all facets of the Program for Applied Academics and Technical Studies (PAATS). The programs, processes and tools that are described in this manual are a direct result of the efforts of the district and the community to become more responsive to the career needs of our youth. The overriding goal of PAATS is to respond to the Vision Statement of Volusia County Schools and Goal 2 of Blueprint 2000. We want our youth to become successful contributors in our democratic society by preparing them for the workforce of the future. It is our belief that students will be lifelong learners and will leave us prepared to enter the workforce AND further their education.

The PAATS chart in the next tab will give a full diagram of the vision for the continuum of services that will assist the students to successfully transition from school to work. Following that diagram will be detailed descriptions of each of the programs, processes and tools that currently make up the continuum of services. It is hoped that all who are involved in the planning and delivery of services to our students will find this manual helpful.

The manual is not intended to be a definitive document but rather a resource of available components that may meet the needs of your students. The programs at your school must be individualized to meet YOUR students' needs. It is hoped that schools will use the continuum to identify gaps in their services and in the planning for service delivery.

reparing students for both work and postsecondary education requires changes in current practice. This manual will assist in the following:

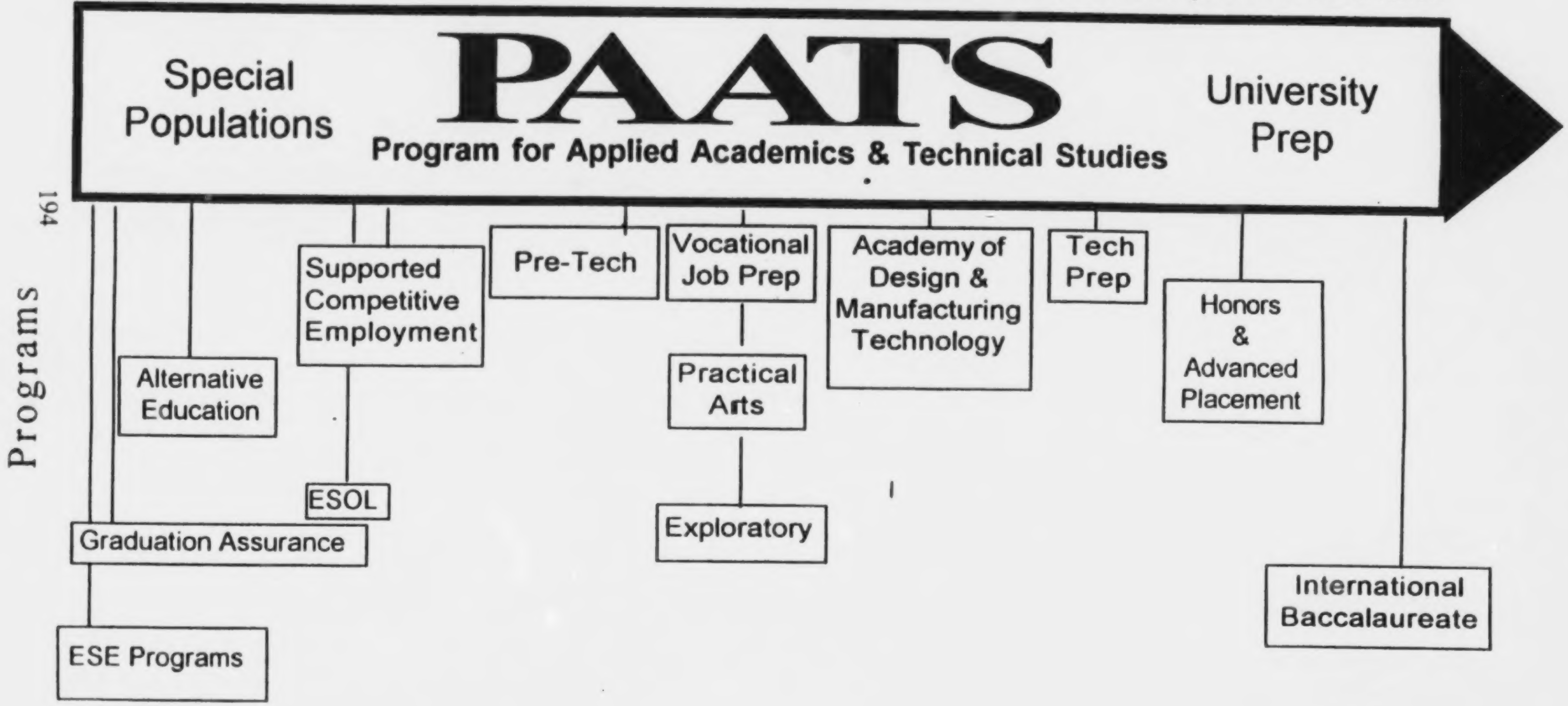
- Elimination of the general track for the middle majority student.
- Raising academic expectations for students and challenging them to meet the higher expectations.
- Career assessment and planning for a productive future.
- Developing 4 or 6 year programs of study in a career major.
- Financial planning for students to achieve a postsecondary goal through dual enrollment and the Gold Seal Scholarship.
- Curriculum and instructional modifications for special populations that will provide for success and skill development for students with special needs.

SCHOOL DISTRIC OF VOLUSIA COUNTY
VISION STATEMENT
Though the individual commitment of all, our students will graduate with the knowledge, skills and values necessary to be successful contributors to our democratic society

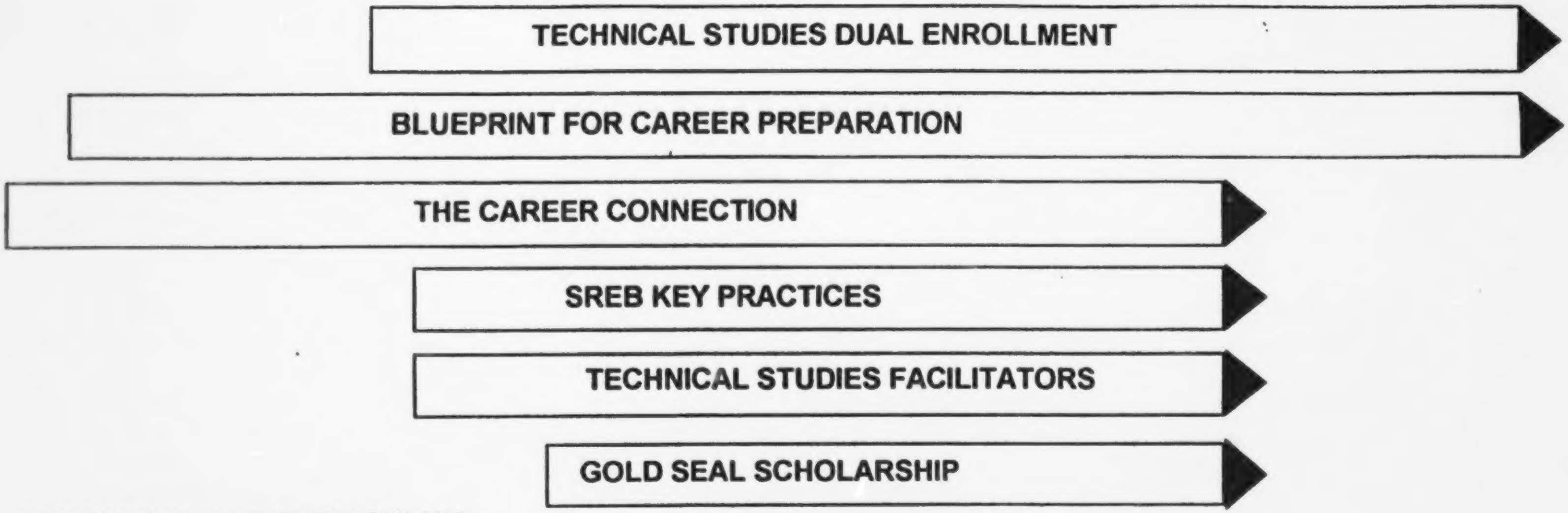
Blueprint 2000 Goal 2: Students graduate and are prepared to enter the workforce and postsecondary education

School-to-Work Transition

Students move along this continuum to assure successful school- to -work transition and the accomplishment of our vision


Special Populations
PAATS
Program for Applied Academics & Technical Studies
University Prep
Programs
Alternative Education
Supported Competitive Employment
ESOL
Graduation Assurance
ESE Programs
Pre-Tech
Vocational Job Prep
Practical Arts
Exploratory
Academy of Design & Manufacturing Technology
Tech Prep
Honors & Advanced Placement
International Baccalaureate

Processes


TECHNICAL STUDIES DUAL ENROLLMENT

BLUEPRINT FOR CAREER PREPARATION

THE CAREER CONNECTION

SREB KEY PRACTICES

TECHNICAL STUDIES FACILITATORS

GOLD SEAL SCHOLARSHIP

Tools

UPGRADING THE CURRICULUM:
- Career clustering
- Course modification
- Technology labs/upgrades
- Performance-based curriculum
- DACUM

ASSESSMENT:
- Learning styles
- Personal/career
- Alternative
- Interest
- Ability
- Aptitude

ORGANIZATIONAL:
- Workplace Essentials
- Scheduling
- Career Clusters
- Program Development
- Dual Enrollment

TEACHING METHODOLOGY:
- Applied academic courses
- Teaming
- Project-driven instruction (TLAs)
- Integration of academic & vocational
- Interdisciplinary
- Performance-base instruction
- Cooperative Education & Internships
- Hands-on (applied) learning
- Cooperative learning

EVALUATION
- Students Profiling
- SREB - NAEP
- HSCT

TECHNICAL STUDIES FACILITATORS

Technical Studies Facilitators are teachers-on-assignment, funded through Volusia County Schools' Perkins Title 11 funds. The facilitators act as change agents in the planning and implementation of school-based tech prep activities, and widen the access of these services to include special populations students. Three teachers are released full-time (DeLand; Mainland; and New Smyrna Beach); two others are teachers who teach two classes and serve as facilitators for the remainder of the day (Deltona and Seabreeze).

Technical Studies Facilitators serve as liaisons for the following groups:

- Middle School - High School - Daytona Beach Community College faculty
- Teachers within a school in the development of teams
- Administration
- Students through the development of student career plans
- Career Connection vocational help teachers and assistants

WHO ARE THE TECHNICAL STUDIES FACILITATORS AT VOLUSIA COUNTY HIGH SCHOOLS?

DELAND HIGH:	Vince Devincenzo 738-8033
DELTONA HIGH:	Tracy Olsen 789-9653, Ext. 3530
MAINLAND HIGH:	Becky Lindhorst 252-0401, Ext. 255
NEW SMYRNA BEACH:	Susan Little 427-4155
SEABREEZE HIGH:	John Ullom 676-1447

WHAT IS THE CRITERIA FOR CONTINUAL FUNDING OF a TECHNICAL STUDIES FACILITATOR AT YOUR SCHOOL?

Since salaries for the technical studies facilitators come from Carl Perkins' federal funds, the following rules must be observed by the schools:

- Carl Perkins' Funds must be used at a limited number of sites to improve vocational education programs, and must include the full participation of individuals who are members of special populations (primarily done through the Career Connection program).
- Districts must give priority for assistance to sites or program areas that serve the highest concentration or percentages of individuals who are members of special populations.
- Funds may only be used if the following three elements are in place:
    1. The project must be of sufficient size, scope, and quality to be effective, thus, a significant number of vocational education job preparatory programs and tech prep (4+2) programs of study.
    2. The project must integrate academic and vocational education through a coherent sequence of courses so students achieve both academic and occupational competencies. (Program of Study)
    3. Funded projects must provide equitable participation for special populations.

TECHNICAL STUDIES DUAL ENROLLMENT

Students can earn both college and high school credit while still enrolled in high school if they choose one of several technical courses linked with programs offered at Daytona Beach Community College.

- High School students do not pay college tuition and other fees.
- High School students attend classes at either their high school or a DBCC campus.
- Transportation to any DBCC campus must be provided by the student.
- Books are provided by Volusia County Schools. Kits or tools that students keep must be purchased by each student.
- DBCC credits are held in escrow until high school graduation.
- DBCC credits may not transfer to other colleges.

WHO SHOULD TAKE TECHNICAL STUDIES DUAL ENROLLMENT?

Students who plan to enter the career oriented programs at Daytona Beach Community College or students planning to enter the workforce immediately after graduation should participate in Technical Dual Enrollment. The program is not for everyone. Credits earned will appear on your college transcript at Daytona Beach Community College. Students will be starting their college GPA and therefore should be prepared to put forth their best effort. Students who plan to earn a bachelor's degree from a four-year college or who plan to transfer from Daytona Beach Community College into a bachelor's degree program should take the high school college prep program rather than the Technical Studies Dual Enrollment option.

DOES TECHNICAL STUDIES DUAL ENROLLMENT EFFECT HIGH SCHOOL GRADUATION REQUIREMENTS?

No. Participating students earn both high school and community college credit.

WHAT DO I HAVE TO DO TO ENROLL?

Have a minimum 2.5 GPA.
Get an "O.K." from your guidance counselor or vocational teacher.
Get an "O.K." from your parent or legal guardian.
Get Dual Enrollment Packet from guidance counselor.
Complete ALL forms in packet (See enclosed sample forms).
Make sure your social security number is on ALL forms.
Attach a copy of your resident alien card or proof of citizenship if you were not born in the United States.
You and your parent/legal guardian must sign ALL forms.
Return completed forms to your guidance counselor.

PRE-TECH PROGRAM

NEW SMYRNA BEACH HIGH SCHOOL

New Smyrna Beach High School offers the PRE-TECH Program designed to increase the academic skills of the low achievers so that they may successfully enroll in the Technical Studies Program (Tech Prep) by the beginning of their tenth or eleventh grade year. Many freshmen students have the *POTENTIAL* to be in the Technical Studies Program but have not acquired the academic skills (reading, writing, mathematics, listening, speaking, and behavior) to do so. This program parallels the Technical Studies Program (Tech Prep) currently being offered at the school, but there is an increased emphasis on the remediation of basic skills previously learned.

WHAT ARE THE PRE-TECH PROGRAM GOALS?

1. To prepare these students for the Tech Prep Program and/or the successful entry into the workforce upon graduation from high school.

2. To incorporate the teaching methodologies of the Tech Prep program.

3. To enable the Tech Prep program to maintain its focus.

WHAT ARE THE SPECIFIC PRETECH COMPETENCIES?

1. Students will achieve the following performance standards for each of the following courses:
    - English Skills 1
    - Exploratory Math 1
    - Earth Science
    - Geography
    - Career Research

2. SCANS and competencies for successful workers appropriate for the ninth grade.

3. Blueprint 2000 performance standards appropriate for ninth grade.

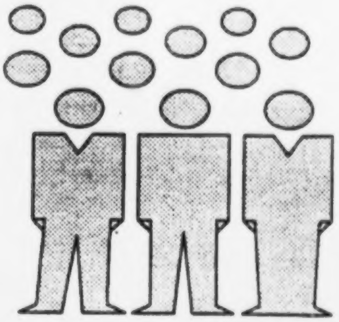
WHAT ARE THE KEY COMPONENTS OF THE PRETECH PROGRAM?

Team teaching, cooperative learning, behavior management, and basic competencies are key components.

HOW DOES THE CAREER CONNECTION WORK WITH THE PRETECH PROGRAM TO PROVIDE EXTENDED SERVICES?

The Career Connection process is utilized by pretech, vocational, ESE, anad reading resourse teachers to individualize instruction to meet the needs of each student. These teachers who work together on the Pre-Tech teacher team, make instructional and curriculum modification, as appropriate, to ensure individual student success. Additional

Career Connection services utilized through the workplace essentials course include career/ vocational assessments, modified instructional materials, and a resource library of career-related material available for check out. Inservice opportunities are also available for team planning and staff development.



[illegible]

English, math [illegible] tional career [illegible] ESE resource [illegible] reading special [illegible] grated units of in [illegible]

PRE-TECH CURRICULUM

Ninth Grade Pre-Tech Program and Its Articulation
with the Tenth Grade Tech and Pre-Tech Programs

GRADE9	GRADE10
English Skills 1	English 2 English Skills 2
Applied Math 1 Exploratory Math 1	Applied Math 2 Applied Math 1 Exploratory Math 2
Earth Science	Biotechnology Biology 1
Geography/Careers	World History
PE/Health	Personal Fitness/Elective
Practical Keyboarding/ Practical Computer	Foreign Language Elective
Elective	Vocational Elective

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A Look At Survey Research Methods

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Critical Issue and/or Concern Paper

Running Head: SURVEY RESEARCH METHODS

Abstract

Survey Research or, as it is sometimes known, Self-Reporting Research, is most commonly identified with a phase of descriptive research know as assessment or evaluation research. The purpose of this paper is to review the types of survey research methods of collecting data, examine the process of collecting the data and identify the common problems associated with survey research. The paper will focus on questionnaires, face-to-face and telephone surveys.

A Look At Survey Research Methods

by
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Houston, Texas
May 20, 1995

Survey Research or, as it is sometimes known, Self-Reporting Research, is most commonly identified with a phase of descriptive research know as assessment or evaluation research. We tend to view survey research through three window panes of loosely interrelated information or operations: opinion polls, marketing research or school surveys. For the most part, in simple terms, survey research is taking a picture (a "snap shot") of what is now. What do people perceive? What do people buy? What do people want? This assessment of attitudes or behaviors does not always associate itself with causal relationships, just current facts, attitudes, or beliefs which are subject to outside influence and change. The purpose of this paper is to review the types of survey research methods of collecting data, examine the process of collecting the data and identify the common problems associated with survey research. The aspects of data analysis or statistical procedures to be used to analyze survey research data will be the topic to a follow-up article.

Generally there are three ways of collecting survey research data: mail-out questionnaires, telephone interviews or personal interviews. Regardless of which method is used to collect the data there are basic steps that are common to all three:

1. Planning: Like any project, survey research begins with a well thought out question(s) that the researcher believes can best be answered through the collection of data most efficiently, cost effectively and accurately using any of the three techniques associated with survey research. (a) The research question(s) are first identified. (b) The hypothesis is clearly formulated. (c) A careful review of the literature is made to ascertain the breadth and depth the study may want to achieve or if the study needs to be conducted at all. (d) A decision has to be reached as to the type of technique that will best achieve the goals of the study. (e) The size of the sample population as well as the population to be studied has to be determined, and finally, (f) The type of statistical procedures used to report the findings will have decided upon.

2. Construction and pretesting of the instrument(s): Of equal importance to the decision on the format to be used, is the writing of the questions to collect data from the sample. This also impacts the pretesting of the instrument on a sub-sample of the population. Experience has shown that a sub-sample of one percent (in most cases) of the population would provide sufficient feedback to modify the questionnaire or procedures to more accurately assess data from the sample population to be surveyed.

3. Collecting and analyzing data: The last step in any research effort is the coding, statistical manipulation, interpreting and reporting of the findings associated with the research project. Whether to use pie charts, bar graphs, measures of central tendency, scattergrams or other pictorial diagrams to better present the findings becomes a complex task unto itself. What is the message the researcher is trying to convey?

Lets examine the typical survey research process:

Selecting and Defining the Research Problem--The research problem is often phrased as a question such as:

1. How does a consumer reach a decision on what to buy?
2. What changes can I make in teaching to increase the student achievement level of a particular objective?
3. Is there a concern about date rape on college campuses today?

In selecting a research topic keep in mind that your interest, imagination and insight has more to do with your research project than any other factor. It is your interest and desire to find an answer to a burning question that motivates you. It is your research, there is no wrong answer or failure. Like Thomas Alva Edison's light bulb experiment, he found out 999 ways how not to make a light bulb before he found out how to make one. In survey research we are not necessarily looking for cause and effect, more often we are looking for opinions and attitudes, therefore, we are looking at what people think or feel at the time we are asking the questions and their self-reporting is their response. We are only recording their response, emotion, or behavior to a specific question or statement.

According to Borg and Gall, the problem statement and introduction should have the following characteristics:

1. It should be written in clear, nontechnical language, avoiding any jargon.
2. The problem should be sufficiently limited in scope to be manageable.
3. The problem should be carefully fitted into the broader context of current theory and relevant research.

4. The significance of the problem should be addressed; that is, does it explore an important question, meet a recognized need, or make a useful contribution to knowledge?
5. The problem should be clearly and logically related to the hypotheses or a series of questions that need to be answered.

Some researchers state their problem in the form of a question instead of stating a working hypothesis. For example: "Is there a significant difference between the scores on a measure of inferiority feelings of a group of low-ability students in ability-grouped classrooms as compared with low-ability pupils in random-group classrooms?" The question form is often easier for the researcher to use because it states specifically the question that the investigator will attempt to answer.

Questionnaire Survey Studies

The first step in conducting **a Questionnaire Survey** is to define the problem and identify the objectives of the study. The following set of questions may help focus your survey topic:

1. Do you want to survey current buying habits of southeastern men during specific years/periods of time?
2. Do you want to study opinions in different states or regions of the country?
3. Are you interested in broad assessment studies or do you want to study sub-groups?
4. What aspects of your study do you wish to focus upon? Are you interested in cost, training, buying habits/interests, professional vs non-professional employees as it relates to vehicle purchases?
5. How abstract is you interest? For example, are you interested in reporting facts or do you want to interpret the facts, relate the facts to a broad social context, or develop theory from the facts?

In preparing your objectives you should keep in mind the type of data analysis you will apply to the returned questionnaires.

Selecting a Sample

Now that you have the objectives/questions well defined and clearly stated, you can now identify the target population from which to select your sample. Keep in mind that the primary purpose of research is to collect meaningful data that can be statistically manipulated and provide generalizations from the sample to the whole population.

As a reminder, a population is any group of individuals that have one or more characteristics in common that are of interest to the researcher. The population may be all the individuals of a particular type, or a more restricted part of that group.

A sample is a small proportion of a population selected for observation and analysis. By observing the characteristics of the sample, one can make certain inferences about the characteristics of the population from which it is drawn. Contrary to some popular opinion, samples are not selected haphazardly; they are chosen in a systematically random way, so that chance or the operation of probability can be utilized. (Best and Kahn 89) The most obvious consideration involved in selection of subjects of a questionnaire study is to get people who will be able to supply the information you want.

Most studies conducted are aimed at specific groups. Once you have identified the population to be studied, you can survey the entire group or you can select a sample from the population. In large populations even the customary 10 percent sample may be far too large. For example, if you wish to sample the population of the U.S. on the upcoming elections of 1996, then even a traditional 10 percent sample of the population would be extremely large, costly, and inefficient. In a very large population a highly selected random sample that is statistically balanced to be compatible with the U.S. population would be identified.

Constructing Questionnaire Items

Investigators, when constructing questionnaires, must first decide on whether to ask open or closed questions. Open ended questions allow respondents to answer in their own words, closed ended questions restrict respondents to selected answers. Depending on the format, wording, and order of the questions the questionnaire will control the respondents reaction, openness, and honesty. If the questions are too ambiguous, or are written in such a way that a person may agree to the first part of the question but disagree with the second part of the question we will obtain conflicting responses depending on which feeling, or which emotion is stronger. For example: Do you believe that gifted students should be placed in separate groups for instructional purposes and assigned to special schools?

The respondent might agree with the concept of separate groups for teaching purposes but be opposed to the gifted students going to special schools. This example shows the need for two separate questions.

Another example might be unwanted assumptions: Are you satisfied with the purchase price on your new car? A no answer might mean either I did not get a good price or that I did get an adequate price but I still am not satisfied because I felt pressure to buy.

Some of the sample population that receive questionnaires in the mail tend to develop negative attitudes about questionnaires as a research tool. Some questionnaires are not organized well, written well, or are slanted to be biased in their outcomes or appear to be just thrown together. In some studies, the qualitative nature of the information sought makes it necessary to use open-form questions. Most investigations which require lengthy responses are best done using the interview method of data collection or by use of audio tapes. Generally however, most mail questionnaires should be designed in closed form so that quantification and analysis of the results may be carried out efficiently, where coding, optical scanning, and /or other more efficient data collecting can be utilized.

The following suggestions on **questionnaire format** will aid in the development and use of mail questionnaires.

a. Make the questionnaire attractive.
b. Organize the questionnaire in some logical sequence.
c. Organize and lay out questions so the questionnaire is easy to complete.
d. Number the questionnaire items and pages.
e. Include brief, clear instruction, printed in bold type.
f. DO NOT start the questionnaire with open-ended items.
g. Use examples before any items that might be confusing or which require a more precise definition.
h. Underline a word if you wish to indicate special emphasis.
i. Put name and address of person to whom the form should be returned at both the beginning and end of the questionnaire.
j. Begin with interesting and non-threatening items.
k. Put threatening or difficult questions near the end of the questionnaire.
l. Do not put important items at the end of a long questionnaire.
m. Include a self addressed and stamped envelope.
n. To reduce any form of prejudice, if possible, do not use the words "questionnaire" or "checklist" on your form.
o. Include enough information in the questionnaire so that the items are meaningful to the respondent.

Pretesting the questionnaire

After the initial development of the questionnaire and before the final printing it is essential that the questionnaire be pretested in order to identify ambiguities, misunderstandings, develop models of evaluation, develop preliminary validity and reliability ranges or identify other inadequacies which would reduce the effectiveness of the respondents or the results of the survey.

In pretesting your questionnaire there are two suggestions that the researcher may wish to consider:

1. Ask colleagues or friends who are familiar with the study to examine the draft questionnaire and give their opinion on the organization, readability and understandability to see if there are any problems that may have been overlooked.
2. Administer the questionnaire personally to a small group of persons drawn from the population to be considered in the study. If the population is large, consider 1 percent of the total. If your population is less than a 1000 and your sample size is under 250 consider no less than 25 participants in the pilot sample.

Particular attention should be paid to the questions the respondents in the pilot group ask during this trial period. For example: "I don't know what you mean here" and "more than one of these answers apply to me." The investigator should try to ascertain whether the questions are interpreted in the same way by all participants, is there confusion in the question, or are the respondents spending an undue amount of time on a question or leaving it blank. All of these clues may indicate problems with the questionnaire and, therefore, skew the results.

The following are a few questions that you may wish to address as a result of pretesting.

a. Are the instructions clear?
b. Do all the respondents interpret the items in the same way?
c. Could confusion result based on the way a question is written?
d. Do the respondents appear to be uncomfortable with the questionnaire and lack motivation to complete it?
e. How long does it take the respondent to complete the questionnaire and is it within the time parameters established?

Mailing out the Questionnaire

Researchers generally find it useful to mail an introductory letter or cover sheet along with the questionnaire to potential respondents introducing the potential respondents to the questionnaire, and "sell" them on responding. There are seven areas that need to be addressed in the cover letter.

1. State the purpose of the study. This should be done in the first paragraph of the letter and should explain the need, importance and stress the helpfulness of the respondent to make the project a success.
2. Do not assume cooperation. The letter should explain why and how the potential respondent was selected and included in the sample and should make an appeal for assistance in completing the study.

3. Confidentially. More honest responses can be obtained when the letter assures the respondents that their responses will be confidential but must also explain how that confidentiality will be maintained. Respondents must be assured that their names will never be placed on the questionnaires themselves; thus, there will be no way to associate particular responses with any individuals.
4. Underwriting /sponsorship of the study. If there is a sponsor for the study, such as a government agency, foundation, or business entity that is underwriting the cost of the study, it should be mentioned in the cover letter. If a university or agency is actually carrying out the administration of the study then agency letterhead would be used to add validity to the study.
5. Request for immediate return. It is important to urge the respondent to return the questionnaire as soon as possible, generally within 10 days. Having a self-addressed and stamped envelope aids in the return. It may be worth mentioning that the survey may only take a few minutes of their time and will eliminate any inconvenience of receiving a second mailing. If the deadline to return the questionnaire is too long, for example, two weeks or a month, then the chances are slim that the respondent will complete it and return it.
6. Giving thanks. An expression of appreciation for their assistance and support of the project by completing the survey should be included in the letter.
7. Promise of results. As an act of good faith and to show your appreciation for their efforts, sharing the findings of the study with the respondents tends to aid in the return. This is generally done by having the respondents check a box on the back side of the envelope and have them include their name and address. (See Example on page 10.)

Follow-ups and Reminders

For maximum benefit and to assure the highest rate of returns a reminder should be made after the first 10 days of initial mailing. Of course a word of thanks should be expressed to those who may have already mailed the questionnaire. In the event a **Second Follow-up** is needed, this should be done between two and three weeks after the original mailing. The second follow-up will include a letter, another copy of the questionnaire, and the self-addressed return envelope. It is appropriate to let the respondent know that their first questionnaire was not received.

Third Follow-up. Occasionally a third and final follow-up is sent out 5-6 weeks after the initial mailing. Again, like the second mailing, a letter, the questionnaire and an envelope will be included. Understand that in some agencies/businesses we will not always receive the 75-90 percent return from the respondents there therefore the researcher may be ready to terminate the survey and to declare the remaining subjects nonrespondents.

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EXAMPLE

May 04, 1995

Dear College of Technology Graduate:

The College of Technology is conducting a survey of recent graduates in order to gather data on attitudes and opinions regarding their educational experiences at the Uof H, College of Technology. We are interested in how well the college met your academic needs. The results of the survey well be used in reviewing and strengthening programs for present and future students.

Your name was drawn in a random sample of all graduates of the College of Technology from 1985 through 1995. In order that the results accurately represent all the recent graduates, it is very important that each questionnaire be completed and returned. Responding should take less than ten minutes of your time, but it will be critical to the success of the study. I encourage you to complete the questionnaire and return it in the enclosed envelope by May 15, 1995.

Your may be assured that your responses will remain completely confidential. The return envelope has an identification number that will enable us to check your name off the mailing list when the questionnaire is returned. The envelope will than be discarded. Your name will never be placed on the answer sheet or the questionnaire. If you are interested in receiving a summary of the results, please check the box on the back of the envelope and it will be mailed to you by late summer.

If you have any questions about the study, please write or call. The telephone number is 713-743-4059.

Your cooperation is greatly appreciated.

Sincerely,

Thomas H. Arcy, Ph.D.
Project Director
Enclosure

Nonrespondents

A serious problem associated with any research is the nonrespondent. One of the early questions that should be considered is why has the respondent chosen not to participate. Within every population surveyed there are subgroups that find something that they do not like about the type of survey, the questions asked in the survey or that just plain do not respond to written, telephone or even interview surveys. The researcher should carefully examine the respondents and nonrespondents to see that a particular subgroup does not bias the outcome. The researcher has to make a decision whether to include the nonrespondents or to remove them so that the results are not skewed. The researcher must feel confident that the responses are representative of the total sample and not a biased percentage. This can usually be done by establishing a formula for determining the minimum proportion of people who must return a survey.

Telephone Interviews

Telephone interview studies have greatly increased in recent years as marketing research has become more intense and as public opinion and mass media has provided instant information on political and current events.

The relative advantages of telephone interviews can be seen in the collection of sensitive data, where talking on the phone is less threatening than face to face and requires less stress or time than completing a survey. Most political polls are done with telephone interviews. The most serious problem with telephone interviewing is that some homes do not have telephones and some homes have two or more phones and can be surveyed more than once. The homeless or those living in shelters are also not counted. Populations like the working poor, tend to eliminate persons without phones that could bias the sample.

Person Interviews

The face to face interview has been the standard by which survey research gained credibility. While the personal interview allows for interaction with the respondent and constant level of communication the quality and quantity of the information obtained is only as valid and reliable as the training the interviewer received.

Experience has shown that a skilled interviewer will have between 80-85% completion rate and few unanswered questions. People prefer to talk rather than write and are more willing to provide oral responses to questionnaires. Also, unlike the phone or mail survey the trained interviewer can monitor the reaction of the respondent to selected questions.

A major disadvantage of the personal interview is the potential for interviewer bias and higher cost. Of the three forms of survey research, the interviewing process is the most expensive.

Validity, Reliability and Training

A major element to a successful interview is the establishing of rapport between the interviewer and the respondent whether it be face to face or telephone survey. Most people react to other people if they feel comfortable, if the topic is of interest to them, if the interviewer is well trained to not lead the respondent to predetermined answers that the respondent begins to feel are misleading, and most respondents will remember the relationships with the interviewer rather than the questions or topics covered.

Validity by definition is the focus of whether the interview or the questionnaire is really measuring what it is supposed to measure. Validity is greater when the interview is carefully designed to ensure that the content received is in keeping with the related objectives.

A few variables that will influence the validity of a questionnaire, interview or phone survey are: Does the respondent feel that there is anonymity, and how important is the topic to the respondent. The more these two items provide a comfort level to the respondent the greater the truthfulness from the respondent, especially when sensitive or personal questions are asked.

Reliability, or the consistency of the responses may be obtained when the same questions are asked in a slightly different manner (internal consistency). Another approach is to administer two difference forms of the questionnaire or interview with the respondent several weeks/months later.

Training is one of the more crucial elements in obtaining validity in the interviewing process. It is important that slang, nonverbal cues, assumptions or other behaviors are not injected into the interviewing process so as not to bias or skew the results of the survey. Practicing with the questions as a script but presenting as a conversation will keep the interview less rigid but structured.

Common Mistakes in Survey Research

Listed below are some of the more common errors made in conducting survey research and should be used as a checklist to assure that these errors do not occur.

1. Selects sample on the basis of time or convenience.

2. Does not formulate clear, specific objectives or state a specific purpose for the research.
3. Overlooks details such as: format, grammar, printing, and organization, which impact the respondents answers.
4. Fails to do a pilot study of the instrument, or procedures.
5. Provides poor or no instruction on how to answer questions.
6. Asks too many questions, making it time consuming and unreasonable.
7. Fails to check sample of nonrespondents for possible bias.
8. Does not provide sufficient training or conduct practice interviews.
9. Asks for information that the respondent is not likely to know.
10. Does not check for internal validity.

Conclusion

The primary purpose of this paper is an attempt to provide a beginning point for those who plan to conduct either written, telephone or face to face surveys. While each of the three types of surveys have advantages and disadvantages the underlying guidelines are: cost, time, efficiency, and experience. The emphasis here has been on the written questionnaire. While a greater in-depth approach as to question quality, quantity, structure and statistical analysis could expand this paper to a book, the intent is to give a broad general overview of the three types of survey research methods. Beginners in survey research should carefully define the goal(s), identify sample population, agree on the type of statistical treatment they plan to use and design the data gathering instruments to assure validity, reliability, and anonymity. Researchers must also realize the extreme importance of pilot-testing any instruments as they attempt to ensure validity, reliability, and consistent training techniques in data collection.

With continued practice and careful adherence to basic principles of survey research techniques, a beginning researcher can gather useful data which will have meaningful results and, therefore, complete a successful project.

We hope that in some way we have provided a window into the complexity, and joy associated with survey research; at the same time , we hope our article encourages the development of valid survey research in the field of marketing education.

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Restructuring Middle School Programs: Implications for Marketing Educators

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Category: Issues and Concerns Paper

Running Head: Middle School Marketing Education

Restructuring Middle School Programs: Implications for Marketing Educators

Educational reform and restructuring has been a major initiative for many local, state, and national organizations during the past several years. "The Nation at Risk" alerted the nation to the deficiencies in the present public education system in America. Publications following including, "The Nation Responds", "The Unfinished Agenda" and many articles and books addressed the needs for change in the ways education does business. The Secretary's Commission on Achieving Necessary Skills (SCANS) Report reawakened the nation to the problems that will face the youth of our nation if we do not improve the education of our students so they can compete in a world-class workplace. The literature focused on workplace needs, made clear the need to change education's expectation from a system that expects some students to achieve to a system that expects all students to achieve high standards and to be able to think, learn, solve problems, make decisions, and face challenges of work and life. Education has been challenged to abandon the "status quo" expectations for the majority of students and to make the connections between high-performance expected for success in the workplace and in the classroom. The emphasis in changing educational practices, expectations, and both student and teacher performance is placed on all levels of education.

This paper focuses on middle school education in the continuum of education from Pre-K through lifelong learning. Much of the literature attests to the criticality of the middle school experience being a time for exploration in all areas of a student's future life endeavors. The literature also reports this period of education as being the time when approximately 25 per cent of the youth are lost through "dropping out" or "tuning out" of their future educational experiences. Many researchers have laid blame on a middle school system of moving students into the "mini" university model school in which all subjects are taught in isolation with little connectivity across or within disciplines; the model is frequently justified because it is the traditional high school curriculum organization and delivery model.

Statement of the Problem-Concern

Since the early 1990's many schools, states, and professional organizations have begun to work collaboratively in an effort to improve education for all students. Instructional concepts, methods, and curriculum in educational disciplines has traditionally been developed for a workplace of the 1950's. In 1990, Florida's Department of Education began reorganizing and restructuring both the academic and the vocational education divisions of the Department of Education. In the restructuring efforts of both broad discipline divisions, content areas and programs within disciplines have been redesigned. Most of the efforts in curriculum restructuring to date have occurred at the high school level in vocational education. In Florida, curriculum frameworks for the various vocational disciplines have undergone a name change from vocational program areas to applied technology program areas. In the academic division, middle school level education programs received major attention in the early 1990's and high school programs are now beginning to receive attention in the restructuring process. Marketing education programs in Florida have gone through a two year continuous process of restructuring from 1992-1994. The Marketing Education middle school frameworks, secondary, post-secondary, and community college level programs were examined, changed, and validated by the various stakeholders in education and business in the research process (Holmes-Bouchillon, 1994).

This paper's central purpose is to provide a vehicle for marketing educators to recognize the mission of the middle school, and challenge marketing education leaders to become a vital part of the future growth in middle school programs.

Concerns and Research Questions

1. Mission: What is the mission of the middle school? What is the mission of applied technology at the middle school level? How does marketing education fit within the mission of the middle school?

2. Curriculum: What should be included in the middle school curriculum? What should be included in applied technology at the middle school level? How does marketing education fit into the middle school curriculum? What are the common barriers to applied technology and marketing education in becoming integral components in the middle school curriculum?

3. Certification: What should be included in certification requirements for middle school teachers? What needs to be changed to facilitate middle school teacher certification including professional development, technical/ subject area development, workplace experiences, and field-based experiences? What are the implications for marketing teacher education?

4. Teacher training and inservice of teachers: What skills and competency areas should be included to prepare marketing teachers and other applied technology (vocational education) teachers for the middle school?

Review of the Literature

Many states are beginning to redefine the purposes of education and to develop a "K-through Lifelong" model that promotes success for individuals in learning and adapting to an ever changing world of high technology, high performance, and quality driven organizations. In Florida, the mission of the K--12 education system is two-fold: to develop skills to successfully continue post-secondary education and to enter the workforce. The educational system and mission is based on a career guidance and development model which allows for stages of awareness, exploration, training, specialization, retraining, updating, changing careers through life. The focus of the middle school curriculum is exploration.

The middle school concept is based exclusively on the nature and needs of youth between the ages of 11 and 15 most commonly found in grades 6-8. The middle school as an educational institution is designed to serve young people who are in the transition period between childhood and adolescence. Ten characteristics of a quality middle school are described by Lounsbury: :

1. A positive school climate, an atmosphere of teacher-teacher, teacher-student, and student-student cooperation.
2. A curriculum organization that clearly departs from the subject/class arrangement for a large portion of the day.
3. A definite curriculum commitment and plan to deal with the affective aspects of education.
4. An extensive program of enrichment, exploratory and interest-centered classes or activities.
5. A comprehensive program of health and physical education that includes both activities and instruction.
6. A developmental skills program that provides for the context teaching of reading and other communications skills for all students.
7. An acceptance of responsibility for developing the desired attributes of behavior.
8. A comprehensive program of evaluation and reporting that reflects the broad objectives of middle level education.
9. An activity/laboratory approach, rather than a presentation/telling approach, is utilized for most instruction.
10. A curriculum that balances the past with the present and deals with topics that have inherent interest to students. (Lounsbury, 1991)

In the description of the role of vocational education in the middle school, Lounsbury notes that vocational education as an integral component in the new curriculum schemes is readily apparent. Understanding the world of work, participating in career-shadowing, apprenticeship activities, exploring clusters of careers, preparing personally for interviews and service as an employee are in line with the needs of young adolescents who are eager and anxious to participate in the world of adults (Hoerner and Wehrley, 1995; Lounsbury, 1991; Beane, 1990). Most middle school educators and researchers agree that the critical exploratory component of the middle school should include both vocational and avocational courses or experiences. The opportunity to explore new aspects of adult life, try out new areas of learning, ascertain career aptitudes and interests are part of the concept of the middle school vision. In addition, emphasis on "what work requires of schools" including emphasis on life-related skills and behavioral attributes are closely related to the middle school objectives. The SCANS workplace competency workplace skill areas including productive use of resources, interpersonal skills, information, systems, technology; and importance of basic skills, thinking skills, and personal qualities are needed at all grade levels and disciplines within the educational system.

In a nuts and bolts overview of middle grades education Forte and Schurr describe the philosophy of an effective middle school. The philosophy--

~ Includes physical, psychological, intellectual, social, moral, and ethical needs based on unique needs and characteristics of the young adolescent;

~ Promotes student-centered rather than subject-centered activities, projects, and curriculum;

- Provides for both pre-service and in-service teacher training to meet the widely-varying exceptionalities in interests, abilities, and experiences of students in transition;
- Accepts and respects each student and teacher; celebrates differences and diversity;
- Requires the same teachers to share the same students over the same block of time in the same general area of the building.

Advantages of the middle school organizational pattern include articulation between elementary and middle school, flexible block scheduling, interdisciplinary approaches, range of exploratory opportunities, daily focus on affective education, emphasis on intramural rather than interscholastic athletics, commitment to active learning and education of the young adolescent. The successful middle school program is seen as forward thinking, outcome-based, and devoted to excellence in classroom instruction, student motivation, and the quest for like skills, broad-based learning, and creative thinking (Forte and Schurr, 1993).

Middle school movement leaders contend that vocational education programs should be perceived as education for employment or for life's work and that the separate subject matter approach results in tremendous overlap. The use of themes as an approach for middle-level curriculum is often recommended; Beane proposes doing away with subject matter lines entirely at the middle level and helping students begin to look at themselves and social meaning. Lounsbury recommends programs assist early adolescents in developing personal characteristics needed to become a "good" person, family member and worker. The AVA Ad Hoc Middle School Task Force formulated a new role for vocational education at the middle school level that reflects the needs of early adolescents, includes key concepts associated with the middle school movement, focuses the curriculum on exploration of life's work and proposes integration of vocational education with the academic core at the middle school level. The report includes belief statements, a philosophy, and core concepts. The following statements are paraphrased from the task force report:

Belief statement--

Vocational education at the middle school level:

- should focus on exploring the real-life roles of worker and family members;
- should provide opportunities for wide array of learning styles and applications to real-life tasks;
- should be active learning, cooperative, with hands-on activities directly related to their lives and concerns;
- be an integral component of the core for all students to prepare them for a culturally diverse world;
- will enhance motivation through the real-life application of basic academic skills;
- does not need a discipline-specific orientation to explore life-work at the middle

adolescent psychology and learning, interdisciplinary methods and strategies, and middle school philosophy. The academic content area requirements for middle school certification are generally reduced from the standard 24 to 30 semester hours required for secondary certification to approximately 18 semester hours of content specific, (i.e. science, math, social studies, language arts) at the middle school level. However, in the areas of vocational education certification, certification is usually listed as 6-12 and requires 30 semester hours in the content area.

Few teacher education programs model the academic and vocational integration and interdisciplinary methods required for success at the middle school. In actual practice in teacher education classes, the interdisciplinary strategies taught in a middle school level curriculum or methods class frequently exclude any participation from the exploratory vocational disciplines. In Florida, a small group of teacher educators from the University of West Florida, University of South Florida, and University of Central Florida persist in working collaboratively with both vocational and academic teacher education methods and professional core classes to integrate curriculum (Johnson, Holmes, and Sorg, 1992).

Lounsbury recommends that the middle school teacher be trained to become an adolescent learning specialist and that all discipline lines, including academic, vocational, fine arts, and others be eliminated. He feels that learning in any classroom setting should be applied to real needs and real life for the middle school student. The concept of discipline certification at the middle level also needs to be eliminated according to both Brazee and Beane .

Design of the Study

The design of the study is descriptive. A team of researchers from the University of West Florida was commissioned to study the Applied Technology curriculum frameworks and to make recommendations in line with current restructuring initiatives in Florida schools to improve middle level applied technology programs in Florida. The team of researchers included an interdisciplinary team of teacher educators from the elementary and middle school, foundations of education and technology, and special, primary, and vocational education departments. The research related to the curriculum including development of a middle school mission statement, new frameworks, modification of existing frameworks, teacher certification, and teacher training has been accomplished through the use of several descriptive methods. The methods included a review of the literature, a review of current related Florida documents and the use of content theme analysis, and input from focus groups utilizing modified nominal group strategies. The methods were applied to discover major issues related to restructuring applied technology (vocational education) at the middle school level.

The focus group utilized in the Restructuring Middle School Applied Technology project included representatives from both academic and vocational education. Teachers, administrators, parents, curriculum specialists, subject area specialists, and teacher educators were included in the focus group membership.

In line with the model proposed for schools of tomorrow in the SCANS report published in 1991, characteristics of schools in Florida are being restructured to include changes in strategies, learning environment, management, and outcomes. The major strategies of the restructured schools and program include focus on development of thinking skills, and assessment integral to teaching; learning environments in which students actively construct knowledge for themselves, cooperatively problem solve, and learn skills in context with real problems in a real world; participate in learner-centered, teacher directed projects and classrooms; and in which all students learn to think. While the study conducted by the team did not concentrate on one program service area specifically, all areas were included in a manner that separate reports for each applied technology program area could be pulled out later. Field research and visits to reported outstanding programs and sites throughout the state were also made in the process of gathering information about applied technology programs that have been restructured during the past five years.

Findings

The study is one which requires on-going field research towards the goals addressing the middle school mission, curriculum, certification, and teacher training and inservice of teachers.

1. **Mission: What is the mission of the middle school?**

The mission statement for middle schools is to provide students with the opportunities, resources, and environment to be lifelong learners and productive, responsible citizens in a changing, global society.

The middle school stands for clear educational concepts which evolve from a melding of the nature of the age group, the nature of learning, and the expectations of society. The essential elements identified by the National Middle Association in their position paper describing their beliefs are:

1. Educators knowledgeable about and committed to young adolescents
2. A balanced curriculum based on the needs of young adolescents
3. A range of organizational arrangements
4. Varied instructional strategies (NMSA, 1992)

What is the mission of applied technology at the middle school level?

The mission of applied technology at the middle school level is to provide all students with opportunities to explore meaningful career paths and acquire the skills to become lifelong learners through a comprehensive curriculum which integrates academic and applied (vocational) skills; reinforces work ethics and community membership; and teaches real life problem solving and social responsibility in a culturally diverse world. (Middle School Restructuring, 1995)

How does marketing education fit within the mission of the middle school?

The marketing education program fits in the American Vocational Association description of the core curriculum at the middle school level and in the career cluster of opportunities in marketing related occupations, positions in a broad concept of marketing related functions and foundation skills found in economic activities and all major occupational clusters.

2. Curriculum: What should be included in the middle school curriculum? Professional standards and redesigned frameworks for curriculum in major discipline areas have been recently adopted by most discipline specific professional associations. The following table illustrates the curriculum strands/themes that have been adopted:

Table 1: Curriculum Strands for Major Disciplines

Applied Technology (including marketing, business, technology, technology, industrial, family and consumer science, public service, health occupations)	**Language Arts**	**Math**	**Science**	**Social Studies**
Integrated learning	Language	Number sense, systems, and operations	Systems and interactions	Time, continuity, and change
Organizational Skills	Literacy	Measurement	Health and well being	Culture
Human and Social Relations	Literature	Geometry and spatial sense	Interactions	People, places, and environment
Consumer Economics	Mediacy (telecommunications, printed)	Patterns, functions, and relationships	Patterns	Science, technology, and society
Problem solving		Data analysis and probability	Change and Stability	Production, distribution, and consumption
Leadership				Individual development and identity
Broad Occupational Exploration				Individuals, groups, and institutions
Career planning and decision-making				Power, authority, and government
Community and work ethics				Civic ideals and practices
Entrepreneurship				Global connections
Technology applications				
Safety				

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What should be included in applied technology at the middle school level?

The strands/themes for the core of applied technology should be included in the middle school level. In addition, the broad service area disciplines have specific common core strands unique to each discipline which have a place in the middle school curriculum. The position paper published by AVA in 1993 includes many of the core competency areas found in the Florida curriculum frameworks for the middle school applied technology offerings.

How does marketing education fit into the middle school curriculum?

When examining the core identified for vocational education by AVA, the major strands for language arts, math, science, and social studies it is evident that marketing connects with all of the major disciplines and provides a rich discipline from which to select real life and workplace applications. The middle school marketing exploratory curriculum in Florida gives students initial exposure to the skills and attitudes associated with a broad range of occupations relating to careers in marketing. The curriculum framework for marketing provides opportunities for students to explore employment requirements and educational requirements, leadership and human relations skills, and economic and technology environments in sales and marketing related occupations including those that market products, services, and process products or services.

What are the common barriers to applied technology and marketing education in becoming integral components in the middle school curriculum?

The most common barriers keeping applied technology and marketing education from becoming an integral part of the middle school curriculum emerge around four major issues which overlap in the descriptions of the issues themselves: curriculum, certification, training of teachers, and planning for change. Curriculum issues included restrictions imposed by both school-based and district-based management, inconsistency in the delivery of programs, lack of inclusion of applied technology (vocational educators) on curriculum teams with academic teachers.

3. **Certification**: What should be included in certification requirements for middle school teachers?

Certification issues raised included the inconsistency of state requirements for middle school teachers with the mission of middle schools, the lack of requirements for vocational teachers to have an understanding of adolescent development and strategies, shortage of certified applied technology and the stringent course and time limit requirements for alternative certification routes.

What needs to be changed to facilitate the needs of middle school teacher certification including professional development, technical/ subject area development, workplace experiences, and field-based experiences?

Recommendations for changes in certifications requirements include the development of competency based certification based upon in-field work experience, course work, testing, and/or peer validation. Other recommendations include providing support for distance learning to be utilized by universities, portfolio and proficiency demonstration, and the involvement of panels of experts.

4. **Teacher training and inservice of teachers:** What skills and competency areas should be included to prepare marketing and other applied technology (vocational education) teachers for the middle school?

Currently Florida does not discriminate between the middle school and secondary applied technology teacher in requirements for certification. Neither level is required to complete coursework or demonstrate knowledge of the adolescent growth and development or middle school philosophy. The Florida teacher credential certifies the vocational educator from 6-12. In Florida, for degreed certification, the subject area content requirements for marketing, business, technology education, and family and consumer science include 30 semester hours in the content area discipline. Certification requirements for academic subject coverage in Florida require only 18 semester hours in the content area.

In Florida, teachers of applied technology may be either degreed or non-degreed if they have met the employment and professional/technical skill requirements; however, non-degreed certificates are issued by the school district rather than the state. Many educators believe that requirements for certification should include specific adolescent psychology and middle school strategies as pre-requisites for teacher employment at the middle school level. Education professionals generally agree that middle and secondary teachers should be degreed teachers and non-degreed teachers should be hired at the middle school only in special situations.

Implications

Marketing educators need to begin looking at the mission of education and develop strategies for providing appropriate career awareness, career exploration, career development, and career specialization throughout the K--lifelong educational experience. They need to insure middle school educators have the marketing background and recommended pedagogical skills to assist adolescents in learning. The curriculum delivery methods used at the middle school should be focused on contextual and applied learning, problem-solving, teamwork, and integrated learning involving both academic and marketing educators. Marketing and other vocational offerings as well as avocational electives should be considered integral to the exploratory experiences and integrated with the academic teams. Certification should be revised to include competencies related to adolescent development and strategies for learning at the middle school level. Content area requirements should parallel those of academic content area requirements at the middle school level. Teacher training and inservice should be developed and implemented to insure that marketing, applied technology, and other elective teachers are included in interdisciplinary teams, projects, and opportunities to be a valued member of the middle school faculty.

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Up-Date: DECA Membership & Winners' Comparison

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Reviewed Paper

Running Head: DECA

Up-Date: DECA Membership & Winners' Comparison

Throughout the years questions have been raised regarding the winners in competitive events at all levels of National DECA (local, state and national levels). People have indicated that students who win are "lucky" and that those who place in each event are not thought to have received their trophy or medallion due to their classroom learning or that teachers with winners teach DECA. To some extent, the change of competitive event format to competency based alleviated the charge of teaching DECA events. However, this charge still remains. This paper will explore the number of winners by region for the six year period beginning in 1988 and ending with 1994. This paper deals only with the number of winners at the national level by regions within DECA as compared with the membership for each region for the same period of time. Within the structure of this paper, there is no proof that "luck" exists or does not exist. However, if there is a consistency of numbers, this may provide further insight for readers regarding the finalists and winners at the National DECA Career Development Conference (DECA CDC). Since little study of student organizations has been completed, a review of literature revealed no insight. No study has been completed on this topic.

Research Questions

- Does the regional location of DECA CDC favorably impact the number of winners in the home region when comparing the membership percentage with the percentage of awards earned in that region?
- Does one region currently dominate in high performance through awards given at National DECA CDC? If so, is there a trend of high performance in that region?
- Is there a positive relationship between the percentage of membership in national DECA and percentage of awards given in the region?

Study Design

The study is descriptive and utilizes secondary data supplied by National DECA. The listing of finalists and those individuals who placed for each competitive event came from the official print-out used for announcing the names during the Grand Awards Session each year at the National Career Development Conference which was transferred to a printed record for National DECA files. The information on these lists was transferred (by the writer) to a computerized listing by state of the competitive events and schools the individuals attended. For the purposes of this paper, these state lists were then transferred to a form which indicated the location and year of the National Conference, the number of winners (first, second, or third places) from each state, the number of finalists (exclusive of those who placed first, second or third), the number of chapters in each state, and the number of members in each state. The number of chapters and the number of members was also obtained directly from National DECA records. This information was provided from the membership records used to determine the number of participants from each state who may compete at the National Career Development Conference. The data was summarized and is presented in the following sections. Regions were utilized rather than states to provide a more compact report form. Data from four regions rather than fifty-four entities (states, territories, D.C., and Canada) provides a useful data summary.

The Regions of DECA

The four regions within the National DECA structure are: Central, North Atlantic, Southern, and Western. Each of these regions are approximately the same size with regard to the number of entities (states, territories, D.C., and Canada) within the region. Table 1 indicates the entities included in each region.

Table 1

States in DECA Regions

Central	North Atlantic	Southern	Western
Illinois	Canada	Alabama	Alaska
Indiana	Connecticut	Arkansas	Arizona
Iowa	District of Columbia	Florida	California
Kansas	Delaware	Georgia	Colorado
Kentucky	Maine	Louisiana	Guam
Michigan	Maryland	Mississippi	Hawaii
Minnesota	Massachusetts	North Carolina	Idaho
Missouri	New Hampshire	Oklahoma	Montana
Nebraska	New Jersey	Puerto Rico	Nevada
North Dakota	New York	South Carolina	New Mexico
Ohio	Pennsylvania	Tennessee	Oregon
South Dakota	Rhode Island	Texas	Utah
Wisconsin	Vermont	Virginia	Washington
	West Virginia		Wyoming

If membership is considered the regions are not equal in size. In 1988 for example, the percentage of membership in each of the regions was: Central = 26%, North Atlantic = 15%, Southern = 42%, and Western = 17%. In the latest year for which these figures are available, 1994, the percentage of membership in each of the regions was: Central = 27%, North Atlantic = 16%, Southern = 44%, and Western = 13%. Figures used throughout this paper include only the High School Division membership and winners. Regional membership figures are listed in Table 2 for each of the six years included in this paper.

Table 2

Regional DECA Membership by Year: 1988 - 1994

Year	Central	North Atlantic	Southern	Western
1988	39, 631	22,732	64,804	25,822
1989	38,752	21,032	60,560	26,531
1990	37,179	20,592	60,036	24,839
1991	34,622	21,188	59,690	24,328
1992	36,168	19,978*	57,760	24,849
1993	34,601	20,030	57,471	19,454
1994	35,370	20,591	56,353	17,285

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*This figure does not include Canada (1992 only).

The total membership for 1988 was 152,989 members. The total membership for 1994 was 129,599 members. The membership dropped between 1988 and 1994 by 23,390. However, the percentages of membership remained constant. This decrease in members represented 15% of the 1988 membership. As indicated in Table 3, these figures range ± 2 percent in the Central, North Atlantic, and Southern Regions and ± 5 percent in the Western Region.

Table 3

Regional DECA Membership by Percentage

Year	Central	North Atlantic	Southern	Western
1988	26	15	42	17
1989	26	14	41	18
1990	26	14	42	17
1991	25	15	43	17
1992	26	14*	42	18
1993	26	15	44	15
1994	27	16	44	13

*This figure does not include Canada (1992 only).

Within the Western Region the highest percentage of membership was 1992 and 1989 and the lowest percentage of membership was 1994. Within each of the regions, the states with the highest membership are listed in Table 4 below.

Table 4

States With Highest Membership in Each Region

Region	State--1988	State--1994
Central	Wisconsin	Wisconsin
North Atlantic	New Jersey	New Jersey
Southern	Texas	Texas
Western	Washington	Washington

These states are consistently the highest membership states within the respective regions. With the drop in total membership, the membership in these states decreased also. As a percentage of the total membership within, the region for 1988 the membership for each of these states was: Wisconsin = 16%, New Jersey = 24%, Texas = 23%, and Washington = 33%. As a percentage of the total membership within the region for 1994 the membership for each of these states was: Wisconsin = 17%, New Jersey = 25%, Texas = 21%, and Washington = 47%. With regard to these percentages the figure for Washington is dramatically larger in 1994 than in 1988. However, other states' percentages are much the same. The actual number of members for the State of Washington in 1988 was 8,613 and in 1994 was 8,171. This is a decrease in the total number of members which is consistent with the decrease in total membership for the regions and for National DECA for this period of time--with a decrease of 442 members (442 = 5% of 1988 membership).

The Regional Winners

For this paper, winners are defined as those who placed first, second, or third and finalists for all National DECA Competitive Events. Within each of the regions the number of winners has remained constant. Table 5 indicates the number of winners and the percentage of total winners in each of the regions for the years 1988 through 1994.

Table 5

Regional Winners: 1988 - 1994

Year	Central		North Atlantic		Southern		Western	
	#	%	#	%	#	%	#	%
1988	83	32	31	12	81	31	68	26
1989	85	32	32	12	69	26	77	29
1990	76	28	49	18	66	24	80	30
1991	84	30	43	16	76	27	75	27
1992	80	29	44	16	83	30	67	25
1993	74	27	44	16	77	28	80	29
1994	77	27	52	18	73	25	85	30

The total number of winners for each year are: 1988 = 263, 1989 = 263, 1990 = 271, 1991 = 278, 1992 = 274, 1993 = 275, and 1994 = 287. These totals fluctuate to some extent due to ties in events and other related factors. Note that the percentages of winners within the regions tend to remain within six (6) percentage points in each region.

Table 6 compares the percentages of membership with the percentages of winners by region for the six year period considered in this paper. In comparing the membership percentages with the percentages of winners, one discovers that the percentages are more evenly distributed among the regions with regard to winners than with regard to membership.

Table 6

Comparison of Membership and Winners by Percentage

Year	**Central**		**North Atlantic**		**Southern**		**Western**	
	M	**W**	**M**	**W**	**M**	**W**	**M**	**W**
1988	26	32	15	12	42	31	17	26
1989	26	32	14	12	41	26	18	29
1990	26	28	14	18	42	24	17	30
1991	25	30	15	16	43	27	17	27
1992	26	29	14*	16	42	30	18	25
1993	26	27	15	16	44	28	15	29
1994	27	27	16	18	44	25	13	30

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*This figure does not include Canada (1992 only).

Table 6 indicates that the percentage of members (M) in the Central Region is higher than the percentage of winners (W), in the North Atlantic Region the percentage varies from slightly below to slightly higher when comparing the winners to the membership, the Southern Region always has a lower percentage of winners than the percentage of membership, and the Western Region consistently has a higher percentage of winners than the percentage of membership in National DECA.

The next factor of interest in this process is the location of the National Career Development Conference during the period of time included in this paper. Table 7 indicates the locations for each of the years considered.

Table 7

Location of Career Development Conference

Year	Location	Region
1988	Salt Lake City, Utah	Western
1989	Orlando, Florida	Southern
1990	San Jose, California	Western
1991	Denver, Colorado	Western
1992	Anaheim, California	Western
1993	Orlando, Florida	Southern
1994	Detroit, Michigan	Central

The location of the Career Development Conference has been affected by several factors: 1) the size of the conference itself; 2) transportation of participants (both on site and to the location); 3) advance planning time; and, 4) "drawing power" of the location. Other factors may also be considered by the National DECA Staff and Board of Directors. These are the factors of which the writer is aware. The size of the conference from year to year varies from over 8,000 individuals to over 10,000 individuals (including competitive participants, leadership participants, officer candidates, professionals, and other attendees). During years in which the location is in places such as Orlando, Florida and Anaheim, California the numbers attending soars to over 10,000 while the years in which the location is not such a hot spot lower attendance is noted. The locations are determined approximately five years in advance--with a longer lead time when possible. The Detroit location was a last minute selection due to a change in the original site accommodations. Originally the site chosen was Salt Lake City. However, the Salt Palace was under construction and was the only site which could accommodate the entire General Session audiences. Therefore a change in location was required.

The first research question: "Does the regional location of DECA CDC favorably impact the number of winners in the home region when comparing the membership percentage with the percentage of awards earned in that region?" may be answered based on this information. The answer to this question is no. By comparing Tables 6 and 7 we discover that the Western Region hosted the CDC during 1988, 1990, 1991 and 1992. For purposes of this paper, 1988 will be used as the base for the discussion which follows. The percentage of membership in the Western Region in 1990 and 1991 was the same as 1988 and one (1) percent higher in 1992. The percentage of winners in 1990 and 1991 was higher than in 1988 and one (1) percent lower in 1992.

The Southern Region hosted the CDC during 1989 and 1993, both in Orlando, Florida. Again using 1988 as the base, the percentage of membership in the Southern Region in 1989 was lower than in 1988 by one (1) percent, but in 1993 the percentage of membership in the Southern Region was higher by two (2) percent than in 1988. The percentage of winners in the Southern Region in 1989 was lower by five (5) percent than in 1988 while the percentage of winners in 1993 was lower than in 1988 by three (3) percent.

The Central Region hosted the CDC only during 1994. The North Atlantic Region did not host the conference during this six year period. In 1994 the percentage of membership in the Central Region was one (1) percent higher than in 1988 and the percentage of winners was five (5) percent lower in that same year.

The second question is: "Does one region currently dominate in high performance through awards given at National DECA CDC? If so, is there a trend of high performance in that region?" The answer to the research question is yes. By examining the data in Tables 5 and 6 it is obvious that the Western region outperforms all other regions. There is a trend toward increasing performance even though membership is declining in the region.

Question three "Is there a positive relationship between the percentage of membership in national DECA and percentage of awards given in the region?" The answer is no. The Southern region has 44% of the membership and 25% of the awards received during the time period examined.

Recommendations

The scope of this paper was limited to comparing the membership within regions to the winners within the same regions. In examining the data, the writer of this paper would recommend examination of the number of DECA Chapters within each of the states in each region to determine whether these have decreased along with the number of members during this six year period. In addition, states should be contacted to determine whether the number of Marketing Education programs have decreased or increased within each of the states. Perhaps this additional information may provide further input - for example, if Marketing programs have decreased, is this the reason for the decrease in membership? Or, if Marketing programs have not decreased but stayed the same or increased, what is the reason for the decrease in membership?

Additional information such as indicated above could only be obtained from each of the states. Other information which may shed light on the topic of this paper would be to obtain the names of the DECA Advisors within the states from which the largest numbers of winners come. If the same advisors are consistently working with winners a question might follow regarding whether these are "good" teachers, the students are "higher" capability, or in fact "luck" does play a part in winning.

Other pieces to add to this study report:

- Compare states in order of ranking for K-12 systems to see if the percent of winners by state or region changes--i.e. Southern states usually lowest ranked Central & Western usually highest
- Examine the events for higher levelthinking skills and contextual learning experiences
- Compare leading states in School to Work programs with high performance states

Integrating Education: Changes Needed in Marketing Education

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Integrating Education: Changes Needed in Marketing Education

Abstract

This paper addresses an emerging issue related to teacher training practices in marketing education; that is, integration of academic and vocational education. With the restructuring of vocational education into career clusters in many areas, a real need to address the changes required by Tech Prep, School to Work, Career Academies, and other innovative programs which utilize marketing curriculum is being felt nationally. The major area of concern common to most innovative programs in the educational restructuring process is the integration of academic and vocational education. It provides questions to consider in preparing the marketing educators of the future which have significant implications for marketing teacher education pre-service and in-service training.

Integrating Education: Changes Needed in Marketing Education

Introduction

With the massive changes in education and restructuring initiatives in vocational education throughout the nation, the need for change in teacher preparation has become an issue for concern. In many states vocational teacher education programs have been losing faculty without replacement. Marketing education is one of the service areas that has been hard hit in recent years because of the lack of numbers in the teacher education field. The dwindling numbers of designated marketing teacher educators in the various states has caused extreme hardships for many teachers in obtaining teacher preparation and certification in marketing education (Samson, 1991). The changes due to restructuring of vocational program areas and development of broad career clusters seem to indicate a need for a "different" marketing teacher for the 1990's and beyond. It seems realistic to expect entirely new configurations of preparing personnel for teaching and leadership in marketing education (Samson,1991, p. 32).

Change in the curriculum and need for teacher training has many implications including the development of new delivery systems, use of distance technology in meeting the needs of future teachers, development of summer institutes, examination of teacher education standards, and a myriad of other issues. The one area of concern that cuts across all areas is that of integrating academic and vocational education.

During the past several years, state and national initiatives have called for academic and vocational integration. Tech Prep, school to work initiatives, career academies, and apprenticeship programs have required educators to develop new paradigms related to curriculum development, delivery, and support in the schools. However, the concern being voiced is whether pre-service and in-service programs delivered by marketing or other vocational teacher educators are ready? Or have they lagged behind in initiating changes required to prepare new or seasoned teachers to integrate academic and vocational curriculum?

Rationale

Marketing education has embedded in the current structure of traditional programs opportunities for overcoming obstacles related to faculty cooperation, curriculum development, instructional strategies, and administrative support in the integration of academic and vocational education. Many teachers currently use DECA competitive written and participating events to promote faculty cooperation in recognizing academic skills required in marketing programs. With the opportunities afforded the marketing teacher to become involved in tech prep programs, development of career academies, and other initiatives, marketing teacher education should be leading the schools in academic and vocational integration.

Discussion

The Marketing Education Association sponsored Tech Prep conferences in 1993 and 1994 was designed to provide marketing education professionals with opportunities to examine, discuss, and learn about marketing related curriculum initiatives in the various states. Participants in the meetings included industry representatives, teacher educators, community college teachers, marketing teachers, state supervisors, tech prep coordinators, and academic teachers. The 1993 and 1994 meetings were attended by a handful of teacher educators from states including Alabama, Mississippi, Ohio, Florida, Texas, Wisconsin, Georgia, and Missouri. The 1994 meeting was a working conference designed to recommend tech prep models for marketing programs. The models presented for each of three programs included approximately eight (8) credits at the secondary level in marketing technical or specialty courses. Course titles in the Marketing/Management Entrepreneurship model included Introduction to Business and Marketing, Marketing Management Fundamentals, Marketing Management Applications (2), Legal and Ethical Environments of Business, Principles of Personal Marketing Communications, Advanced Personal Marketing Communications, Management Principles. The models were presented as "ideal" with the notion that they would need modification for local or state requirements. Academic competencies are clearly identified in the marketing models presented by MarkEd. In recent restructuring initiatives in Florida of the marketing curriculum, it is clear that most programs will be expanded to include higher level competencies including management applications and a minimum of three credits at the secondary level; marketing career academies for tech prep often include up to six credits in a combination of marketing and business subjects.

In a recent monograph by Turner, he cites Ten Basic Tenets for change in Marketing Teacher Education (1990). While Turner cites eight major tenets for change in marketing teacher education, the three that relate to academic and vocational integration are identified in this paper. Included in his recommendations are suggestions that the marketing teacher preparation major should be developed across disciplines, rather than consist mainly of one traditional discipline; that marketing teacher education programs should provide futuristic training for tomorrow's secondary program needs. Specifically, marketing teacher education methods and curriculum classes should emphasize:

~ The benefits to student learning outcome of maintaining high expectations.

~ Educating secondary students beyond the level of occupational task lists.

~ Accepting a supportive role in teaching the basics through vocational application.

~ Providing an atmosphere conducive to create and innovative thinking regarding delivery of curriculum and programs.

- Developing in the future marketing teacher the ability to utilize the vocational approach to teach through occupations rather than merely for them. (Turner, 1990, p. 33)

The role of marketing teacher education in making the connections to facilitate academic and vocational integration through the professional development programs of individuals served through preservice and inservice education is a timely issue.

Blank, Holmes, and Scagglione (1992) identified seventeen structural and programmatic changes for teacher education in Florida to facilitate the academic and vocational integration through university participation. These recommended changes have been modified for marketing teacher education professionals. Is it time for the following changes to become important issues in marketing teacher education?

1. Recognize that marketing teacher education can be a positive force in fostering major changes in our educational system--including integrating academic and vocational education.
2. Demonstrate integration strategies such as cooperative learning, team teaching and active learning in preservice teacher education courses and experiences.
3. Develop integrated academic/marketing teacher education inservice programs.
4. Move away from so many subject and grade level specific

professional education course requirements for teacher certification and move toward more integrated requirements.

5. Have an integrated team of academic and marketing teacher educators provide preservice teacher education coursework for a cadre of marketing and academic preservice teachers and then provide support during their first several years in the profession.
6. Restructure vocational teacher education programs to provide comprehensive certification coverage recognizing transferability of workplace skills across and within career clusters.
7. Restructure colleges of education to eliminate separate departments for vocational and for academic programs and to provide for workplace awareness and career development from the elementary through post-secondary level.
8. Provide pre-internship and partial internship experiences for marketing student teachers at the middle school and secondary levels and in interdisciplinary programs. Place marketing interns in schools with carefully selected supervising teachers who are successfully integrating academic and vocational education.
9. Provide training in academic/vocational integration philosophies and strategies to key players in the preservice teacher education system.
10. Require all current marketing and academic teachers to complete an inservice component or course on curriculum

integration and restructuring education to renew their teaching certificates.

Implications

The need for change in the curriculum and in pre-service and in-service education is being driven by local, state, and national initiatives related to restructuring training for the workplace. The real long term change begins in the teacher educator's classroom. Where are teacher educators in the process? Do marketing teacher educators currently model skills and competencies required for integrating vocational and academic education involved in faculty cooperation, curriculum development, instructional strategies, and administrative procedures?

Recommendations

Research related to practices in marketing teacher education and teacher educators' levels of participation in academic and vocational integration is needed. It is also time to re-examine the Standards for Marketing Teacher Education established in 1987. It is truly time to change the way we do business, or get out of the way of those who will.

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